

South Tyrol's Markets in Tourism Marketing

Germany (82.2 million inhabitants)

1) Positioning

There are six tourist themes: Relaxation and Well-being; Food and Drink; Hiking and Mountaineering; Skiing and Winter; Leisure and Sport Biking; and Towns and Culture. But South Tyrol has also added a focus on Competence in Green and Alpine Issues. The dissemination of these two new themes is mainly achieved using a variety of PR measures with the aim of encouraging the target groups to perceive South Tyrol as open and progressive.

Positioning: this is derived from the brand's core statement.

Campaigns and cooperations with publishers are used to communicate the core themes such as well-being, enjoyment, activity (skiing, hiking, cycling), food and drink and climate. This mix conveys South Tyrol's unique attitude towards life in the sense of the contrasting symbiosis of Alpine and Mediterranean.

2) Target group

South Tyrol's target group is people with a passion for travelling and who are interested in nature and outdoor activities as well as culture and food and drink. They see themselves as people who like to enjoy life, not only in terms of food and drink but in all areas (slow travel, hiking for pleasure). Sustainability and healthy eating are important to them. They attach importance to quality, for which they are also willing to pay more.

Depending on the priority of the seasonal campaign, this target group is supplemented so that the theme is specifically targeted at the right people (for example, skiers for winter).

3) Key visual (Print brochure)



4) Useful links

- www.suedtirol.info
- www.wasunsbewegt.com
- www.facebook.com/altoadige.suedtirol
- www.instagram.com/visitsouthtyrol
- https://twitter.com/suedtirol_info

5) Facts & Figures: German visitors to South Tyrol 2015

- 2,832,348 arrivals (summer 15: 1,895,902)
- 14,378,294 overnight stays (summer 15: 9,588,398)
- 48.8% of the total overnight stays in South Tyrol
- The 3 most popular regions: Merano/Meran and Environs, Valle Isarco/Eisacktal, Plan de Corones/Kronplatz
- The 3 most popular months for travel: September, August, July
- Average length of stay: 5.1 days
- Spending behaviour (ASTAT - Provincial Office of Statistics 2008): winter €134, summer €100
- Means of transport: car (88%), coach (10%)
- Booking behaviour: 32% travel agent, 7% tour operator, 17% online travel agency

Italy (60 million inhabitants)

1) Positioning

There are six tourist themes: Well-being and Relaxation; Food and Drink; Hiking and Mountaineering; Skiing and Winter; Leisure and Sport Biking; and Towns and Culture. But IDM has also added a focus on Competence in Green and Alpine Issues. Core messages and themes in the promotional materials are:

- Balance, "Benessere", Well-being in Nature
- Winter, Skiing, Activity
- Good fresh air, Cleanliness, Quality
- Regional products (foodstuff)
- Living authentic traditions

2) Target group

- people wanting a holiday in the mountains and whose psychographic characteristics match South Tyrol's values (potential: 14 million people)
- 50% women, 50% men
- 35-64 years
- Household with higher net income
- High level of education A Levels/university (48%)

3) Key visual (Print brochure)



4) Useful links (suedtirol.info, Facebook, etc.)

- www.suedtirol.info/it
- www.storiedavivere.com
- www.facebook.com/altoadige.suedtirol
- www.instagram.com/visitsouthtyrol
- https://twitter.com/suedtirol_info

5) Facts & Figures: Italian visitors to South Tyrol 2015

- 2,308,041 arrivals
- 9,394,738 overnight stays (summer 14/15: 5,648,458)
- 31.9% of the total overnight stays in South Tyrol
- The 3 most popular regions: Plan de Corones/Kronplatz, Alta Pusteria/Hochpustertal, Valle Isarco/Eisacktal
- The 3 most popular months for travel: August, July, December
- Average length of stay: 4.1 days
- Spending behaviour (ASTAT 2008): winter €140, summer €103
- Means of transport: car 80%, coach 11%
- Booking behaviour: 26% travel agent, 64% online travel agency

Switzerland (8.3 million inhabitants)

1) Positioning of South Tyrol

In addition to the tourist themes - Well-being and Relaxation, Food and Drink, Skiing and Winter and Towns and Culture - IDM has also added a focus on Green Issues and Alpine Competence to the programme. Core message for Swiss tourists is that South Tyrol is a great place to enjoy life, featuring its own unique cuisine and the combination of the Alpine art of cooking with Italian finesse ("dumplings and spaghetti"). South Tyrol, unlike any other alpine region, can lay claim to a unique position with its typical cuisine, outstanding wines and quality local products.

2) Target group

German-speaking Switzerland has 1,159,000 inhabitants. The South Tyrol target group is people interested in nature, culture and outdoor activities. They see themselves as people who like to enjoy life, not only in terms of food and drink but in all areas (slow travel, hiking for pleasure). Sustainability and healthy eating are important to them. They attach importance to quality, for which they are also willing to pay more. Depending on the priority of the seasonal campaign, this target group is supplemented so that the theme is specifically targeted at the right people (for example, skiers for winter).

3) Key visual (Print brochure)



4) Useful links (suedtirol.info, Facebook, etc.):

- www.suedtirol.info
- www.wasunsbewegt.com
- www.facebook.com/altoadige.suedtirol
- www.instagram.com/visitsouthtyrol
- https://twitter.com/suedtirol_info
-

5) Facts & Figures: Swiss visitors to South Tyrol 2015

- 355,091 arrivals (summer 15: 243,521)
 - 1,454,231 overnight stays (summer 15: 1,051,540)
 - 4,9% of the total overnight stays in South Tyrol
 - The 3 most popular regions: Merano/Meran and Environs Bolzano/Bozen and Environs, Val Venosta/Vinschgau
 - The 3 most popular months for travel: July, October, September
 - Average length of stay: 4.3 days
 - Spending behaviour (ASTAT 2008): €161 (winter), €130 (summer)
 - Means of transport: car (90%), coach, train
- Source: ASTAT

Austria (8.7 million inhabitants)

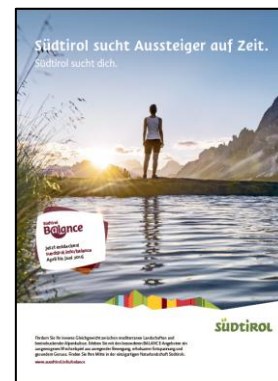
1) Positioning

In addition to the tourist themes - Well-being and Relaxation, Food and Drink, Hiking and Mountaineering, skiing and Winter and Towns and Culture - South Tyrol has also added a focus on Green Issues and Alpine Competence to the programme. In Austria, as in Germany, it is important to correct perceptions of contemporary issues distorted by clichés in favour of seeing things as they really are, whilst not neglecting the traditional customs such as Törggelen.

2) Target group

South Tyrol's target group is people with a passion for travelling and who are interested in nature and outdoor activities as well as culture and food and drink. They see themselves as people who like to enjoy life, not only in terms of food and drink but in all areas (slow travel, hiking for pleasure). Sustainability and healthy eating are important to them. They attach importance to quality, for which they are also willing to pay more.

3) Key visual (Print brochure) summer – winter



4) Useful links (suedtirol.info, Facebook, etc.)

- www.suedtirol.info
- www.wasunsbewegt.com
- www.facebook.com/altoadige.suedtirol
- www.instagram.com/visitsouthtyrol
- https://twitter.com/suedtirol_info

5) Austrian visitors to South Tyrol 2015

- 300,361 arrivals (summer 15: 212,973)
- 901,497 overnight stays (summer 15: 623,227)
- 3.1% of the total overnight stays in South Tyrol
- The 3 most popular regions: Merano/Meran and Environs, Bolzano/Bozen and Environs, Valle Isarco/Eisacktal
- The 3 most popular months for travel: September, October, August
- Average length of stay: 3 days
- Spending behaviour (ASTAT 2008): winter €144, summer €134
- Means of transport: car, coach, motorbike/bike (Source: ASTAT)

UK (64.6 million inhabitants)

1) Positioning

Marketing focuses on the tourist themes: Well-being & Relaxation, Food and Drink, Hiking and Mountaineering, Skiing and Winter, Leisure and Sport Biking. Targeted key messages are intended to help define a clear marketing image of South Tyrol:

Keymessages Summer:

- Affordable high quality
 - Magical diversity from Alpine to Mediterranean
 - Cultural experiences
 - Gastronomy
 - Insiders' tip
- Winter
- Affordable high quality
 - Perfect slopes and guaranteed snow
 - Cultural experiences
 - Gastronomy
 - Insiders' tip

2) Target group

- Winter holidays in the snow (obvious product, 2% of Britons enjoy winter holidays in the snow)
- Those looking for an activity holiday in the warmer weather (small refined niche: 1% of Britons enjoy summer activity holidays)
- Holidaymakers who like "touring trips" and/or "rural holidays" (12% resp. 15% of Britons are interested in these types of holiday). These types of holidays are for "discoverers" (13% of the population, income £25,519, age 26-35 years, 40% of them are families, fashions and trends have little influence, set their own standards, are happy to accept new things) and "cosmopolitans" (15% of the population, income £26,004, age 15-25, enjoy an active life with lots of variety, love new and different things, they do what they want).

Source: Arkenford market modelling & research

3) Key Visual



4) Useful links

- www.suedtirol.info/en
- www.facebook.com/southtyrol.suedtirol
- www.instagram.com/visitsouthtyrol
- https://twitter.com/suedtirol_info
- www.suedtirol.info/summer

5) Facts & Figures: UK visitors to South Tyrol 2015

- 49,750 arrivals (summer 15: 28,074)
- 234,273 overnight stays (summer 15: 104,568)
- 0.8% of the total overnight stays in South Tyrol
- The 3 most popular regions: Alta Badia, Val Gardena valley, Merano/Meran and Environs
- The 3 most popular months for travel: February, July, March
- Average length of stay: 4.7 days
- Spending behaviour (ASTAT 2008): winter €241, summer €122
- Means of transport: plane (72%), car (24%)
- Booking behaviour: 62% travel agent, 29% online travel agency

Belgium (11.3 million inhabitants)

1) Positioning

Marketing focuses on the six tourist themes: Well-being & Relaxation, Food and Drink, Hiking and Mountaineering, Skiing and Winter, Towns and Culture, Leisure and Sport Biking. Targeted key messages are intended to help define a clear marketing image of South Tyrol:

Key Messages for the winter

- Good weather
- Good food
- Lifestyle: Italian flair and Alpine charm
- Northernmost region of Italy
- Perfect slopes and guaranteed snow

Key Messages for the summer

- Good weather
- Good food
- Lifestyle: Italian flair and Alpine charm
- Northernmost region of Italy
- Wide range of opportunities for outdoor activities

2) Target group

The target group is the following people in the Flemish-speaking area:

- Age: 40-60, household net income €3,000 or more, tend to travel with family in summer, with friends in winter
- Psychographic characteristics: look for the extraordinary, which distinguishes them from others; high culinary expectations and like to enjoy themselves; the combination of health and activity is important; interested in authenticity and new experiences; value scenery, good weather and well cared for environment, as well as the Alps "with class"
- Those looking for a summer activity holiday (climbers, mountain bikers, hikers, fans of trekking)
- Winter holidays in the snow (primarily skiing, with good food, wine, lifestyle, wellness)

Source: Allensbach, Karmasin Motivforschung

3) Key visual winter



4) Useful links:

- www.suedtirol.info/nl
- www.facebook.com/beleefzuidtirol
- www.instagram.com/visitsouthtyrol
- www.300daysofsunshine.be
- www.suedtirol.info/slaapwel

5) Facts & Figures: Belgian visitors to South Tyrol 2015

- 67,085 arrivals (summer 15: 34,755)
- 374,575 overnight stays (summer 15: 187,472)
- 1.3% of the total overnight stays in South Tyrol
- The 3 most popular regions: Plan de Corones/Kronplatz, Merano/Meran and Environs, Valle Isarco/Eisacktal
- The 3 most popular months for travel: July, February, August
- Average length of stay: 5.6 days
- Spending behaviour (ASTAT 2008): winter €123, summer €94
- Means of transport: car (69%), motor home (17%)
- Booking behaviour: 25% travel agent, 46% online travel agency

Netherlands (16.8 million inhabitants)

1) Positioning

Marketing focuses on the six tourist themes: Well-being & Relaxation, Food and Drink, Hiking and Mountaineering, Skiing and Winter, Leisure and Sport Biking, Towns and Culture. Targeted key messages are intended to help define a clear marketing image of South Tyrol:

Key Messages for the winter

- 300 days of sun
- Contrast between Italian flair and relaxed Alpine cordiality
- Small-scale accommodation providers
- Varied scenery and natural contrasts
- Modern skiing facilities and guaranteed snow

Key Messages for the summer

- 300 days of sun
- Varied scenery (outdoor activities and nature)
- Small-scale accommodation providers
- Hospitality, small-scale providers

2) Target group

- age 40-60, household net income more than €3,000, tend to travel with family
- Psychographic characteristics: look for the extraordinary, which distinguishes them from others; high culinary expectations; the combination of health and activity is important; interested in authenticity and new experiences; value scenery, good weather and unspoilt environment
- In general: distances are not a problem, set off sometimes with caravan on the spur of the moment, love hospitality and the sense of being made welcome
- Those looking for a summer activity holiday (mountain bikers, hikers, mountaineers, lovers of water sports)
- Winter holidays in the snow (primarily skiing, with good food, wine, lifestyle, wellness)
- We also see potential in good food and activity holidays (activity holiday combined with food and drink), biking holidays

Source: Allensbach, Karmasin Motivforschung

3) Key visual (Print brochure)



4) Useful links:

- www.suedtirol.info/nl
- www.facebook.com/zuidtirol
- www.instagram.com/visitsouthtyrol
- <https://twitter.com/zuidtirol>
- www.suedtirol.info/zomer

5) Facts & Figures: Dutch visitors to South Tyrol 2015

- 114,555 arrivals (summer 15: 73,512)
- 551,419 overnight stays (summer 14: 310,433)
- 1.9% of the total overnight stays in South Tyrol
- The 3 most popular regions: Val Gardena/Gröden, Alta Badia, Alpe di Siusi/Seiser Alm
- The 3 most popular months for travel: July, February, August
- Average length of stay: 4.8 days
- Spending behaviour (ASTAT 2008): winter €123, summer €71
- Means of transport: car (71%), motor home (18%)
- Booking behaviour: 12% travel agent/ tour operator, 79% online bookings (direct bookings/booking portals)

Czech Republic (10.5 million inhabitants)

1) Positioning

Marketing focuses on the tourist themes: Skiing and Winter, Food and Drink, Leisure and Sport Biking, and Hiking and Mountaineering. Targeted key messages are intended to help define a clear marketing image of South Tyrol:

- Mix of Mediterranean flair and relaxed Alpine cordiality
- Food and Drink
- Perfect conditions for a family holiday
- Dolomites
- 300 days of sun

2) Target group

- Aged 25-55
- Household net income: €1,800 – €3,000 per month per person
- urban areas
- In the winter: skiers and active people (from beginner to professional, but mainly passionate male skiers, who visit the Alps several times each winter, not only together with their families but also for a holiday with friends, plus good food, wine, sunny weather, Dolomites, lifestyle); people who like to enjoy food and wine; families (this is addressed mainly to women since they are "family opinion leaders" and often decide where the family is going on holiday)
- In summer: those looking for an activity holiday (hikers, mountain bikers, mountaineers, golfers)

3) Key visual



4) Useful links

www.suedtirol.info/cs

<https://www.facebook.com/jiznityrolsko>

5) Facts & Figures: Czech visitors to South Tyrol 2015

- 64,275 arrivals (Winter 14/ 15: 47,647)
- 288,959 overnight stays (winter 14/15: 232,820)
- 1% of the total overnight stays in South Tyrol
- The 3 most popular regions: Plan de Corones/Kronplatz, Valle Isarco/Eisacktal, Alta Badia
- The 3 most popular months for travel: March, February, January
- Average length of stay: 4.5 days
- Spending behaviour (ASTAT 2008): winter €131, summer no data
- Means of transport: car (81%), coach, motor home
- Booking behaviour: 31% travel agent/tour operator, 20% online

Poland (38.5 million inhabitants)

1) Positioning

Marketing focuses on the themes Skiing and Winter in combination with Food and Drink. Targeted key messages are intended to help define a clear marketing image of South Tyrol:

Winter

- Modern skiing facilities and guaranteed snow
- Italian weather and sun
- Cuisine with Italian and Alpine influences
- Nearest Italian destination to Poland

2) Target group

- Aged 25-60
- Household net income: min. net 5,000 Polish złoty per person (€1,200)
- People from urban areas (mainly cities with a population > 500,000 such as Warsaw, Krakow, Lodz and Breslau, as well as individual smaller cities such as Katowice in Silesia).
- In winter: skiers and active people (from beginner to professional, passionate skiers, plus food, wine, sunny weather, Dolomites, lifestyle), people who like to enjoy food and wine, families

3) Key visual



4) Useful links

www.suedtirol.info/pl

<https://www.facebook.com/poludniowytyrol/>

5) Facts & Figures: Polish visitors to South Tyrol 2015

- 49,770 arrivals (winter 14/15: 40,996)
- 291,603 overnight stays (winter 14/15: 261,721)
- 1% of the total overnight stays in South Tyrol
- The 3 most popular regions: Plan de Corones/Kronplatz, Merano/Meran and Environs, Val Gardena/Gröden
- The 3 most popular months for travel: February, January, March
- Average length of stay: 5.95 days
- Spending behaviour (ASTAT 2008): winter €141, summer no data
- Means of transport: car (79%), coach, motor home
- Booking behaviour: 41% online booking system, 18% direct bookings, 13% travel agent, 10% online travel agent

Russia (143.3 million inhabitants)

1) Positioning

Marketing focuses on the themes Skiing and Winter in combination with Food and Drink. Targeted key messages are intended to help define a clear marketing image of South Tyrol:

Themes and key messages for winter

- Dolomites
- Northernmost region of Italy
- Mix of Mediterranean flair and relaxed Alpine cordiality
- “Dolce Vita” on the slopes
- Lifestyle
- 300 days of sun

2) Target group

- Aged 25-60 years
- Affluent people from the Moscow and St. Petersburg conurbations
- Active people (focus on skiing, from beginner to professional, plus enjoyment of food and wine, lifestyle on the slopes, wellness), families and people who like to enjoy life.

3) Key visual



4) Useful links

www.suedtirol.info/ru

<https://www.facebook.com/SuedtirolRU>

5) Facts & Figures: Russian visitors to South Tyrol 2015

- 24,354 (winter 14/15: 19,351)
- 152,163 overnight stays (winter 14/15 134,796)
- 0.5% of the total overnight stays in South Tyrol
- The 3 most popular regions: Val Gardena/Gröden, Merano/Meran and Environs, Alta Badia
- The 3 most popular months for travel: January, February, March
- Average length of stay: 6.2 days
- Spending behaviour (ASTAT 2008): winter €141, summer no data
- Means of transport: /
- Booking behaviour: 37% travel agent, 60% online travel agency

France (66 million inhabitants)

1) Positioning

Discovering special, exclusive places
 Enjoying new experiences as an “insider”
 Beautiful views
 300 days of sun
 Outdoor activities (biking in summer, skiing in winter)
 High quality accommodation
 Expectation of high quality food and drink

2) Target group

- Upper class, described by the agency as “the affluent”
- Average net monthly household income of €8,500
- Between 35 and 64 years of age
- They love nature, outdoor activities, sustainability and originality (authenticity)
- In selecting the target group we concentrate on the geographical areas of: Île-de-France (Paris and surrounding area), Lorraine, Alsace, Burgundy, Franche-Comte, Rhône-Alpes and Provence-Alpes-Côte d'Azur
- Only 27% of the French holiday abroad, make their own travel arrangements and use their car as their means of transport
- South Tyrol is far less well known than the Dolomites

3) Key visual



4) Useful links

- www.suedtirol.info/fr
- www.facebook.com/SudTyrolItalia

5) Facts & Figures: French visitors to South Tyrol 2015

- 41,454 arrivals
- 172,086 overnight stays
- 0.6% of the total overnight stays in South Tyrol
- The 3 most popular regions: Merano/Meran and Environs, Valle Isarco/Eisacktal and Plan de Corones/Kronplatz
- The 3 most popular months for travel: February, July, August
- Average length of stay: 4.2 days
- Spending behaviour (DZT [German Travel Agency] 2013): €112
- Booking behaviour: 10% travel agent/tour operator, 45% online booking portals