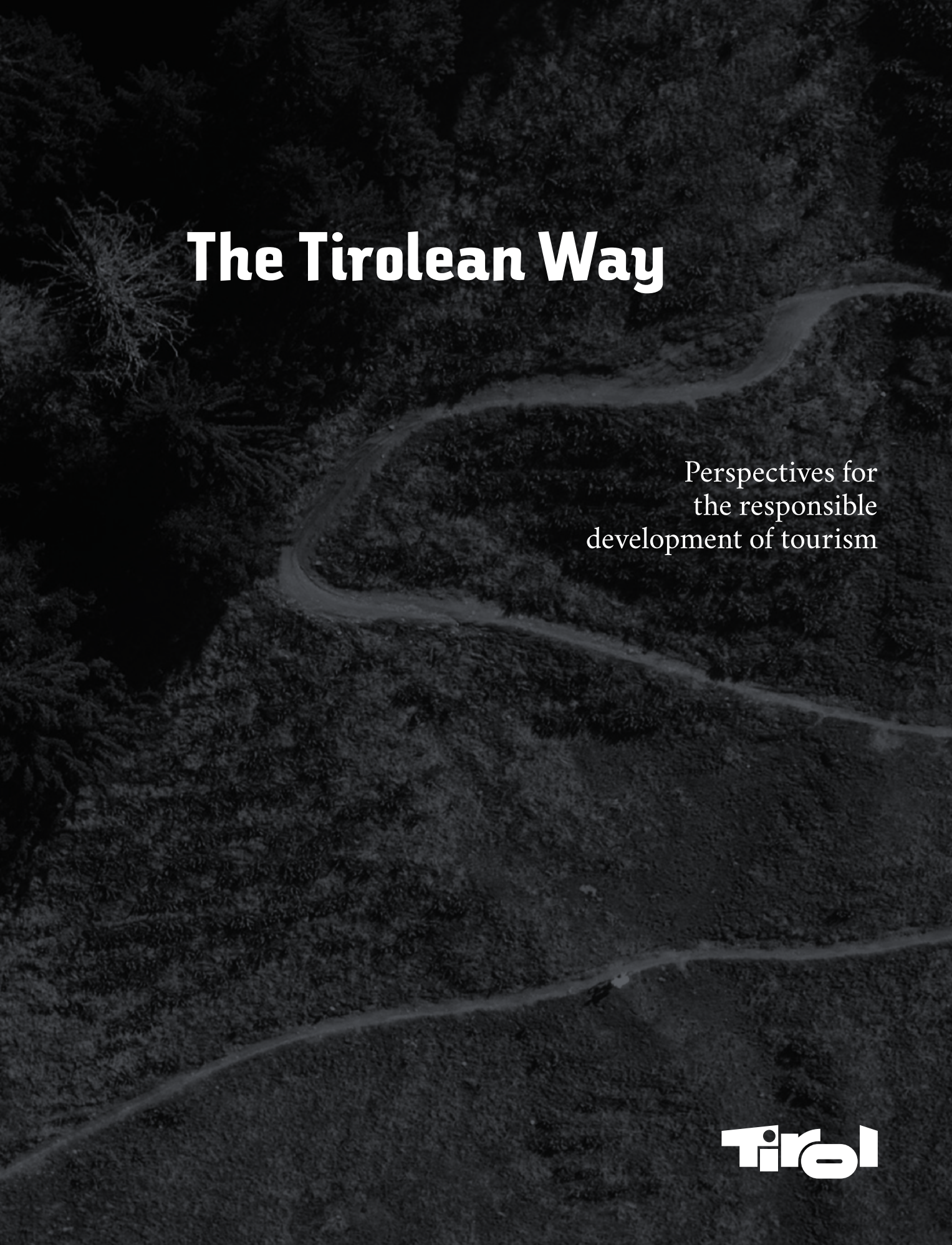

The Tirolean Way

Perspectives for
the responsible
development of tourism

Tirol

The Tirolean Way is the perpetuation of a tourism strategy for quality of life and sustainable developments in tourism in Tirol since 1972. Its implementation should always be perceived as an ongoing process – as a way, or "path".

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Since the beginning of Tirol‘s tourism history, which goes back well over 100 years, it has – with only a few exceptions – always flourished. In 2020, however, the world changed – more than we have known for a long time. Much of what was previously believed to be safe and secure was turned on its head, and the same applies to Tirol. But every crisis also brings with it the opportunity to take stock and realign the compass settings. As is the case now. After this unprecedented situation, we know there are many good and established things that we want to hold on to. However, the Corona pandemic has also revealed some aspects that need to be readdressed. It is the reason why this Tirolean Way represents a Tirolean tourism strategy that, even more so than before, takes into account the limited spatial resources, efficient mobility solutions and this special alpine attitude to life, understands and advocates the issues of population integration, employee satisfaction, regionality and sustainability as the foundation of a family-based tourism industry – so that we can continue to produce the best for our country and the people who live and stay here.

Günther Platter,
Governor of Tirol and Tourism Minister

The essence of the Tirolean landscape, as Arthur Zelger sees it – evening sky mountain landscape, mountain stream and the peaks bathed in sunlight.

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1

The Tirolean Way

Perspectives for the responsible development of tourism

Tourism concepts such as the Tirolean Way establish direction and structure for responsible and competitive developments in tourism.

Small breaks not only help you find the next waymarker, but also open your eyes to the surroundings – like here to the peacefully grazing sheep on the Goetheweg Trail, The North Chain.

1.1 From progression to re-evaluation

Tirol is one of the oldest and most successful tourist regions in the world. This is due not only to the entrepreneurial verve, innovative ideas and sheer drive of the people within the Tirolean tourism sector but is also the product of decades of tourism policy development, self-analysis and solid management. Since the 1970s, tourism concepts and strategy papers on the "Tirolean Way" have provided direction and structure for the responsible and competitive development of tourism in Tirol. These tourism strategies are the result of ongoing re-evaluations on a path of continuous development which, on the one hand identifies areas for potential improvement and, on the other, *contributes to the progress of tourism* in Tirol as a whole. Many elements of these papers have been implemented and supported by the Tirolean Tourism Act (the oldest tourism law in the world, dating back to 1911) and corresponding regional planning programmes. Today, Tirol is one of the most experienced and comprehensively managed tourism regions throughout Austria and the world.

1.2
Harnessing the positive power of tourism

Since the beginning of tourism developments in Tirol, the main objective has been to harness the positive power of tourism – to enhance the beauty of the country, to promote its talents and boost the income of its inhabitants. With pioneering spirit, passion and confidence for a better future, the first tourism entrepreneurs laid the foundations for the realisation of this intention more than 150 years ago. Tourism quickly brought prosperity, jobs and new perspectives for the local population. However, negative impacts of rapid tourism development on the environment and society soon became apparent. After great *"euphoric growth"* in the post-war period, Tirol's first tourism concept in 1972 stipulated a move away from this in favour of *"priority to qualitative growth"* under a *"contemporary protection of nature and landscape"* (Tirolean Tourism Concept I, 1972, p. 4f). It became clear that the positive power of tourism can only be effective under a conscious guidance that takes into account the close interdependence with its environment. A synthesis of this attitude is expressed in the definition of quality of life as the primary objective of tourism development.

Light, air, silence and a feeling of gratitude. One of the many moments in which the quality of life in Tyrol becomes tangible – at Brandstadl in Söll.

"Tirolean tourism policy must be structured in such a way that its provisions make an optimal contribution to the preservation and enhancement of the general quality of life in the province."

Tirolean Tourism Concept II, 1982, p. 14

Because hospitality is more than just good food.
Demonstrated admirably by the Unterwirt
in Ebbs.

Tirolean tourism is family-oriented
and thinks in terms of generations,
not quarterly statistics.

1.3
The relationship between sustainability, quality and quantity

The demand for *quality instead of quantity* is therefore not new and has been addressed in many initiatives. Economic stability and competitiveness have been achieved on the basis of a relatively small-structured and predominantly family-run business environment. The tourism and leisure industry continue to be the leading sector of the Tirolean economy. Almost every third euro generated in Tirol is directly or indirectly related to tourism and roughly every fourth full-time job can be attributed to the tourism and leisure industry. A balance between the seasons has also been achieved to a large extent through the selective development of tourism products and services, making Tirol one of the most well-balanced all-year-round regions in the Alpine region.

But what understanding of quality is the basis for the philosophy of *better instead of more?* Based on the maxim of *qualitative instead of quantitative growth* and the general understanding that quality is more important than quantity, Tirol as a tourism region faces the challenge of satisfying a pronounced demand for quality, while at the same time ensuring the necessary quantity to safeguard prosperity, especially in the rural regions. In recent years, critical questions about the quantitative sustainability for people and nature have come to the fore, as has the goal of qualitative growth in the quality of services and experiences offered. As a result, escalating trends and developments in the areas of entertainment and après-ski, sometimes do not conform with the desired definition of quality. Tirol, on the contrary, can pride itself on a quality of relationship between hosts and guests that is unique in many places and manifests itself in a deep bond and loyalty. This reflects a special accomplishment of the family-oriented structures in Tirolean tourism, where thinking in terms of generations clearly takes precedence over *thinking in terms of quarterly statistics.*

1.4
A steady focus on quality of life for the local population and sustainability

The prosperity and quality of life of the population are not only influenced by the creation of jobs in tourism, but leisure activities created by tourism demand are becoming increasingly diverse and fully available to locals. In addition to the cable car companies, tourism associations are also increasingly developing year-round services and creating infrastructures that benefit the local population as well as visiting guests. The success of tourism is also based on Tirol‘s global leadership in competence and innovation, especially in mountain technology (e.g. transport comfort and alpine safety), sports medicine, mountain rescue services, ski schools and mountain guides.

Customs, culture and art have always been lively elements in the diversity of tourism in Tirol. Questions of aesthetics and sustainable architecture in natural and rural environments have increasingly become the focus of tourism development and will continue to gain significance in the future. Although the basic attitude towards tourism in the service of quality of life and in harmony with the environment has manifested itself in many initiatives, the goal of sustainable tourism development has never been achieved. On the contrary – in order for the positive power of tourism to develop, it requires constant adaptation to ever-changing influencing factors and an ongoing, honest examination of the limits of sustainability. The abundant experience of Tirolean tourism also obliges us to take the next steps mindfully, by applying past lessons and new insights.

The joy of taking the next step brings lightness to a long tour. Ski tourers in Sölden.

Tourism development in the service of quality of life and in harmony with the environment is a never-ending process.

Tirol must be a pioneer and active initiator
of sustainable tourism development
in the Alpine region.

1.5
Demonstrate Leadership

The rich experience and comprehensive alpine competence of Tirolean tourism obliges and at the same time offers the opportunity to demonstrate leadership, making Tirol a model region for sustainable tourism development on an economic, ecological and social level. Tourism in Tirol bears the responsibility for creating an attractive living environment, a sought-after recreational area, as well as a sustainable economic region. It regards itself as a driving force for a cosmopolitan, future-oriented structuring of our society. Tirolean tourism aspires to maintain its role as competence leader and role model in Alpine tourism.
To this end, contemporary, innovative and often bold steps in the further development of tourism must be identified and consequently implemented.

Experience, focus and devotion to the challenge allow us to reach ever higher aspirations. Innsbruck, Hafelekar, Via Ferrata

You can feel the magnificence of the mountain world on the narrow trail to Kaunergrat Hut.

Tirol represents a balance of economic, social and ecological **SUSTAINABILITY**

Tirol is the best **COMBINATION** of nature, sport and mountain experiences worldwide.

Tirol is the very epitome of alpine **LIFESTYLE**

2

The sense of identity in Tirolean tourism

As leader in its field, the long-established and fundamental ethos of Tirolean tourism of improving the quality of life of its inhabitants while protecting natural resources, is already reflected in many measures. For the positive power of tourism to continue to develop, it requires constant adaptation to ever-changing influencing factors and an ongoing, honest examination of the volatile limits of sustainability. The extensive disruptions of 2020 in particular have shown how fragile economic systems have become in times of digitalisation and globalisation. Moreover, the various disruptive events in the global economy, environment and health have also highlighted vulnerabilities in the system of the global tourism and leisure industry in glaring clarity.

The Tirolean Way is based on the exchange between numerous key players in tourism and beyond the industry, with a constant and discerning eye on the development of the process. Thanks to the results of intensive exchange with the numerous stakeholders and ensuing objectives, the identity of Tirolean tourism has emerged, consisting of the quintessential Alpine elements of *sustainability, connection and lifestyle.*

2.1 Sustainability

Tirol represents a balance of economic, social and ecological sustainability.

Tourism is an essential prosperity factor in Tirol. The well-being of many regions is largely determined by a functioning tourism industry. In addition to economic aspects, social and ecological aspects are also considered in equal measure and brought into a sustainable balance for which the UN Sustainable Development Goals serve as a basis and orientation.

2.2 Interconnection

Tirol is the best interconnection of nature, sport and mountain experiences worldwide.

Experiencing nature and the landscape, activity and sport, but also pleasures of the palate and an element of alpine idyll are central motivations among guests for taking a holiday in the Alpine region. Tirol is able to combine these holiday aspirations with its range of leisure elements for guests and locals alike, in a way that almost no other region in the world can rival.

2.3 Lifestyle

Tirol is the very epitome of alpine lifestyle.

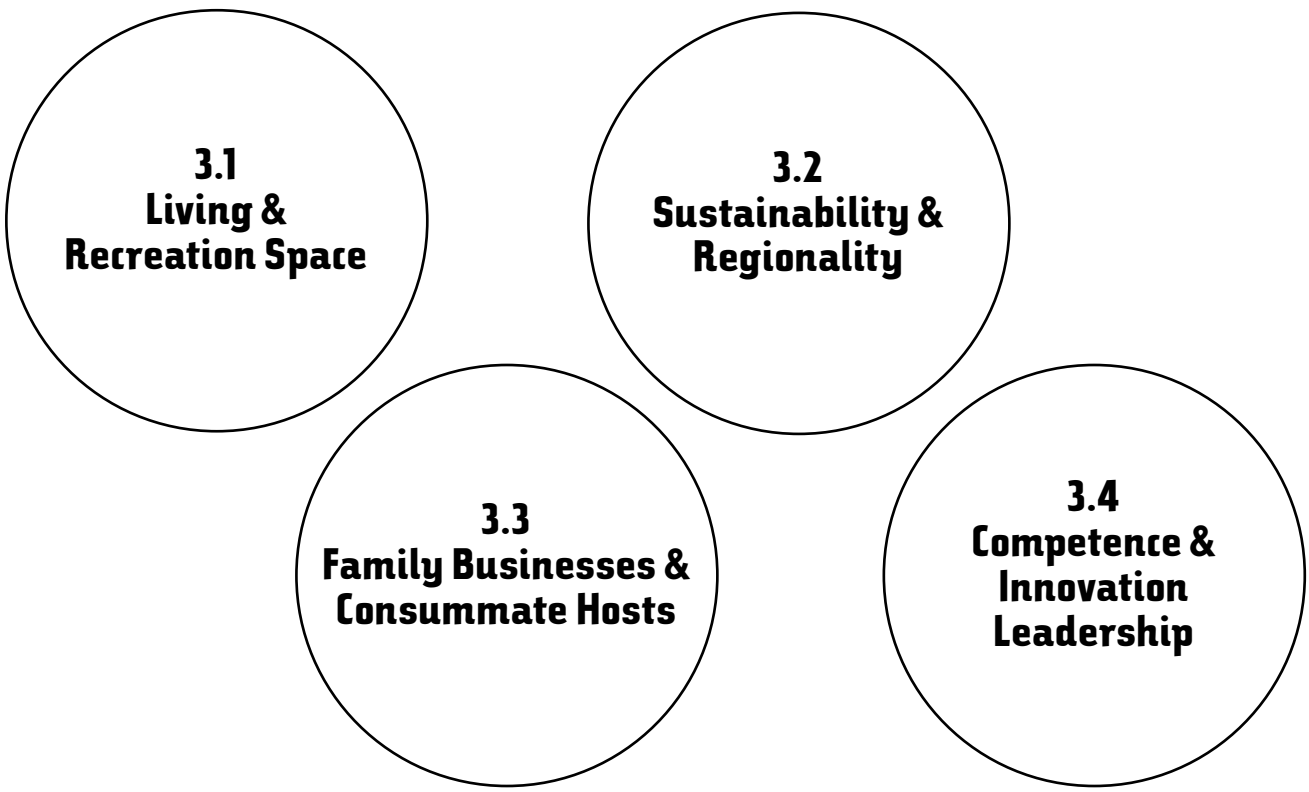
Alpine lifestyle describes people with a certain attitude towards life, a way of coping positively with life. This is associated with an alpine mountain world that conveys stability, openness, straightforwardness and joie de vivre. For locals and guests alike, the alpine attitude to life constitutes attitude and experiencing intrinsic values. Becoming the epitome of alpine lifestyle also means coming to terms with one's own identity, appreciating it, nurturing it and passing it on.

In the great outdoors but still on safe paths – a well-established trail marking on Steinberg in the Rofan Mountains.

3

Four major pillars and guiding principles

The four major pillars represent the basic principles of tourism development in Tirol. They are fundamental cornerstones for advancements in the Tirolean Way and the basis for guiding and continuously updated measures.



A small dwelling so that plenty of landscape remains. The charming "Ufogel" house in Nußdorf, East Tirol.

3.1 LIVING & RECREATION SPACE

Tirol is a living, recreational and economic area all rolled into one: Tirolean tourism takes place amidst the real lives of the local population and not in a separate holiday setting. The distinctive features of this living space and details of its identity must be recognised, appreciated, promoted, linked to the tourist programme and made authentically accessible.
On this basis, Tirolean tourism facilitates individually impressive and above all life-enriching experiences for guests and locals alike. To create a harmonious setting with, which both the local population and guests can equally identify, Tirolean tourism must continuously address the spatial compatibility of its development.

This spatial compatibility includes, above all, the conservation of resources, the careful use of nature and cultural landscape in positive agreement with its owners, the development of new mobility solutions, confronting the expected consequences of climate change and the fact-based analysis of capacity limits. Moreover, tourism that is integrated into the environment can only succeed with ambitious architecture and high quality in the creation and refurbishment of services and leisure-specific infrastructures.

3.1.1 Dialogues on tourism in the environment

Regional and trans-regional stakeholder dialogue forums

3.1.2 Quantitative expansion limits for accommodation providers

Upper limit on the number of beds for large accommodation establishments

3.1.3 Respectful use of space

Respectful use of space, which must be in harmony with nature, alpine agriculture and forestry.

3.1.4 Quality of design & revitalisation of village centres

Combining the quality of the tourist product with the ambience and aesthetics of the surroundings.

3.1.1 Dialogues on tourism in the environment

Regional and trans-regional stakeholder dialogue forums

An important aspect for the equally sustainable and innovative further development of Tirolean tourism is the **proactive dialogue with its stakeholders and interest groups.** An open and ongoing discourse on the Tirolean way in tourism at **regional** (destinations, regions, municipalities) and **supra-regional level** (Province of Tirol, interest groups, alpine associations, etc.) should create **a common understanding of future tourism development. Dialogue and discourse formats** with the population and important stakeholders (e.g. agriculture, educational institutions, associations, cultural initiatives, political decision-makers, etc.) are an essential aspect for this approach. In this respect, early involvement of the "next generation" seems to be of particular importance, which should be achieved among other things, through intensified communication with (tourism) schools in the province.

3.1.2 Quantitative expansion limits for accommodation providers

Upper limit on number of beds for large accommodation establishments

Tirol sees itself as a **year-round quality leader** in the Alpine tourism sector and does **not strive for future quantitative growth** in the total number of beds, which has in fact experienced a slight decline over the past 35 years. Central target parameters of a qualitative growth are an increase in occupancy and price enforcement. In this regard, the following is recommended:

- To retain the existing definition in the Spatial Planning Act for a **special zoning "large-scale accommodation facility" from 150 beds** and
- Set an **upper limit for a special zoning "large-scale accommodation facility" at 300 beds.**

The majority of Tirol's accommodation establishments are small and medium-sized family-run businesses. This business structure not only contributes to Tirol's special charm, but also provides the basis for a regional distribution of wealth through tourism. Consolidating these structures also requires consensus and a c**ommon strategic orientation** in tourism development and dedication issues between municipalities, planning associations and tourism associations with regard to investor models, large-scale accommodation businesses, chalet villages and the like.

3.1.3
Respectful use of space

Respectful use of space, which must be in harmony with nature, alpine agriculture and forestry.

Tirol's leisure and sports facilities form the essential basis for a recreational area that is in demand **all year round for both locals and guests alike.** The growth rates in overnight stays in summer in recent years and the general trend towards outdoor sports are reflected in the **increased use of outdoor space.** Furthermore, a clear diversification of sports in summer and winter is noticeable. In particular, an increasing number of different summer and winter sports are being practised, which also **take place away from the cable car and piste infrastructure.** The area in which a large part of the recreational sports activities are practised is sensitive natural space and managed agricultural or forestry land.

As a competence leader in year-round mountain sports and in the spirit of a comprehensive quality assurance, Tirol must become a **pioneer in spatial and visitor management** that protects nature, responds to the interests and management processes of **agriculture and alpine farming,** forestry, hunting and fishing in positive and appreciative cooperation, and at the same time assures the experience of nature sought by the different user groups. This requires basic visitor management strategies and concepts for important yet controversial sports, which provide the basis for locally adapted solutions at tourism association level. The "Bergwelt Tirol – Miteinander erleben" (Mountain World Tirol – Experience it Together) programme was introduced in Tirol, which includes the development and implementation of such concepts in close cooperation with the province's landscape department.

Specific concepts for current developments in the field of nature sports include:

- **Assessment of visitor frequency** in outdoor areas as a basis for visitor management and information for landowners.
- **Establishment of a map system** in the form of a mobile app with the infrastructure for all relevant outdoor sports and real-time information on trail conditions and closures (natural events, forestry closure areas, trail construction measures, agricultural processes such as cattle drives, harvesting, etc.).
- Raising awareness and establishing **behavioural guidelines for locals and guests** in the area regarding nature conservation, respect for agriculture and alpine farming processes, forestry and hunting.
- Consideration of the special features and **market growth of the e-bike segment** in bike concepts and the "Tiroler Mountainbikemodell" (Tirolean Mountain Bike Scheme).

3.1.4
Quality of design & revitalisation of village centres

Combining quality of the tourist product with the ambience and aesthetics of the surroundings.

Tourism and leisure activities entail enjoying a specific space for a certain period of time. **Spatial design** is an essential component of holistic quality assurance. In a world of increasingly globalised competition, coherent spatial, building, infrastructure and location design beyond mass technocratic standardisation is becoming an essential **differentiating feature** and **quality criterion.**

For this reason, Tirolean tourism has set itself the goal of preserving aesthetic spatial units and promoting a coherent spatial atmosphere, architecturally high-quality construction and the creation of infrastructure that blends into the landscape and ecosystems.

Specific solutions to this issue include:

- Raising awareness and **communicating expertise on architecture and design** in tourism education and further training.
- Recommending use of services provided by the **Tirolean Design Advisory Council.**
- **Revitalisation of village centres and redensification before new construction:** In lieu of furthering urban sprawl, village/town redensification should be promoted and village centres should be revitalised as identity-creating focal points of the community for residents, businesses and guests through the integration of businesses and culture.
- Improved coordination between **municipalities, planning associations and tourism associations** on issues of regional development, land use and design.

"Where living environment and recreation areas are so inextricably linked as in Tirol, tourism development must be continuously re-examined."

Hubert Siller,
MCI Tourism

"As a living, recreational and economic region, Tirol offers the ideal sounding-board for the enduring aspirations of locals, employees and guests. Preserving this, is also the responsibility of tourism."

Florian Phleps,
Tirol Werbung

The beautiful alpine landscape was not born for pleasure, but suitable visitors are always welcome. Two Tirolean grey breed teenagers in Hochsölden.

3.2 SUSTAINABILITY & REGIONALITY

Holidays in the Alps are one of the most sustainable forms of tourism worldwide. Tirol strives to play a pioneering role in sustainable Alpine tourism development on an economic, social and ecological level. In addition to numerous operational and regional initiatives, Tirol manages a sustainable economy in the sensitive alpine region with appropriate laws and regional planning programmes – such as the *"Tirolean Cable Car and Ski Area Program"* (TSSP) or the *"Tirolean Golf Course Programme"* (TGPP). The success of Tirolean tourism is also reflected in the participation of the local population and appreciation of regional economic cycles. Tirolean tourism promotes and develops the special features of the region by means of its demand. It is characterised by well-established family businesses and their cross-generational thinking and working. There is a clear commitment to quality tourism, while taking careful account of sustainable and efficient resource management.

Quality does not stand for luxury, but for increasing regional value creation in the sense of regional economic cycles. This can only be achieved in a value-appreciating and value-adding exchange with its numerous stakeholders.

3.2.1 Steering sustainability within the destination

Development and implementation of a multi-dimensional sustainability strategy within destinations (Destination Sustainability Governance)

3.2.2 Mobility offensive and climate neutrality

100 % use of regenerative drive systems for on-site mobility and climate-neutral ski resorts by 2035

3.2.3 Strengthening of regional economic cycles

Tourism and agriculture create strong regional economic cycles.

3.2.1
Steering sustainability within the destination

Development and implementation of a multi-dimensional sustainability strategy within destinations (Destination Sustainability Governance)

In continuation of previous objectives for sustainable tourism development in Tirol and implementation of the Austria Master Plan for Tourism (Plan T), a stronger institutionalisation and **strategic governance of sustainable development at destination level is required.** Sustainable development at destination level is seen as **impetus for innovation and dialogue in the region.** Pilot projects of the **Clean Alpine Region** (CLAR) model regions already show that the strengths and special features of the respective destination can be used in many ways for activities in the fields of sustainability and climate protection.

Implementation of **institutionalised standards** in all Tirolean tourism destinations is the objective. The federal government is also currently working on an environmental quality certificate for destinations, which is based on the destination criteria of the **Global Sustainability Tourism Council** (GSTC-DC) and thus also in line with the **Sustainable Development Goals** (SDGs) of the United Nations.

Specific solutions to this issue include:

- all Tirolean destinations develop a **strategy for managing sustainable development** (economic, social and ecological) starting in 2022.
- all Tirolean destinations will be awarded the newly created **Austrian environmental quality certificate for destinations** (the guidelines are to be published at the beginning of 2022 from when certification will be possible).

Development and implementation of the sustainability strategy will be managed by the respective **tourism associations** within each respective destination.

3.2.2
Mobility offensive and climate neutrality

100 % use of regenerative drive systems for on-site mobility and climate-neutral ski resorts by 2035

Both travel mobility and on-site mobility, should be made even more environmentally friendly. In terms of commuting to and from the province, Tirol aims to **increase the share of public transportation usage from 10 % to 20 % by 2035.** In order to achieve this, long-term strategic partnerships with the most important mobility providers (including VVT, ÖBB, DB, SBB) must be maintained.

The following aspects are essential in this context:

- Establishment of an **interdisciplinary working group** for joint planning & implementation of mobility projects relevant to tourism.
- Joint development of **attractive package offers** (e.g. Nightjet to the snow) with a high convenience factor for guests (included luggage transport, sports equipment rental, etc.)
- Expansion of (seasonal) **direct rail connections** from the most important source markets as well as maintaining the high number of inter-city stops in Tirol.
- Active cooperation in **Austria-wide mobility concepts:** development of an Austria-wide congress ticket for the MICE sector (Meetings, Incentives, Conventions, Events) is of particular importance in this respect.
- Increased **communication and awareness-raising** among accommodation providers and guests: concrete plans include a roll-out of the *"Green Travel Alternatives"* web application at tourism associations and businesses in Tirol and continuation of the *"Mobility Coaching"* programme at tourism associations and businesses.

In terms of on-site mobility, the aim is to achieve **100 % use of regenerative drive systems** by 2035. **Local public transport** plays a **central role** in this context. Furthermore, communication of existing public transport services (tickets that include public transport, ski bus offers, etc.) must be intensified. A significant CO2 reduction can also be expected through the increase of regenerative forms of energy in private transport.

In addition to this sustainability offensive in the mobility sector, Tirol aspires to have only **climate-neutral ski regions by 2035.** Unavoidable emissions are to be offset by **regional climate protection projects.** The Tirolese cable car industry has already initiated extensive measures for the environmentally conscious development of mountain-based tourist facilities.

3.2.3
Strengthening of regional economic cycles

The interaction of tourism and agriculture creates strong regional economic cycles.

With the production of high-quality, naturally produced food and the resulting characteristic alpine cultural landscape, agriculture often provides a **foundation for the final tourism product.** It is an essential part of the alpine identity and embodies a way of life adapted to the alpine conditions. The small-scale agriculture that is still prominent in Tirol and its products increasingly represent a unique international sales opportunity. Guests place increasing value on regional cuisine and expect **products from local agriculture** to be available. An essential premise for cooperation between tourism and agriculture must therefore be to value and promote these **small-scale agricultural structures in product development as a distinguishing feature.**

Initiatives to increase the use of local food in gastronomy and tourism product development include:

- **Situation analysis** and data collection on existing strengths and weaknesses in the value chain between agricultural production and tourism.
- **Labelling of the origin of food in the catering sector** is recommended. Support for the labelling of local foodstuffs is provided by various initiatives including, "Bewusst Tirol" by the Tirolean Agricultural Marketing, *"Qualitäts- und Herkunftssicherungssystem"* by Netzwerk Kulinarik and *"Ich sag wo's herkommt"* by Tirolean Agricultural Marketing, the Tirolean Chamber of Commerce and Tirolean Chamber of Agriculture.
- Awareness raising and networking of **tourism and agriculture in training and further education** – for example in apprenticeship training and in school projects *("Genussbotschafter Ötztal"* or the *"genial REGIONAL"* school project)
- **Initiatives for the integration of Tirolean food** in the hotel industry, gastronomy and tourism product development. These include closing gaps in the value chain and pooling offers by creating logistics, storage and distribution structures, as well as addressing food wholesalers more intensively. **Installation of a culinary management system** as an interface to the tourism associations and regional management, as well as the development and implementation of **regional culinary experiences** (e.g. gourmet routes, themed weeks, show farms, culinary events) also promote the integration of local food in tourism.

"Austrian agriculture not only produces food of the highest quality and animal welfare standards, but especially in Tirol, it also forms the foundations for the final tourism product. It must become a matter of course – which also corresponds to visitor expectations – that these foods are also offered in local businesses."

Theresa Mitterer-Leitner,
MCI Tourism

"Transformation towards sustainability and climate protection are the social challenges of the coming years. We use and protect alpine resources so that the next generations of mountain and winter sports enthusiasts can also benefit from the Tirolean environment."

Ralf Roth,
German Sport University Cologne

3.3 FAMILY BUSINESSES & CONSUMMATE HOSTS

The familial atmosphere is a key success factor in Tirolean tourism and a decisive factor for consummate hospitality. Family businesses create and maintain identity, while forming the very backbone of Tirolean tourism. It is thanks to the persistence of the entrepreneurial families and their multi-generational thinking that tourism has largely remained in Tirolean hands to this day. Thanks to their sincere hospitality and high level of service orientation, family businesses continue to deliver on the key pledge of an Alpine tourism region. Many successful businesses are already being managed in their third generation.

The young tourism professionals are increasingly well educated, have international experience and run their businesses with oodles of know-how and entrepreneurial spirit. This generation combines professionalism with a sense of home and warm hospitality, thus conveying a modern, but thoroughly authentic form of the alpine lifestyle. When it comes to staff management, experience and improved training, these entrepreneurs contribute significantly to the upgrading of jobs in the tourism sector.

The journey is often the reward – you don't have to convince yourself of that on the hike to the Aldranser Alm ...

3.3.1 Management of family businesses

Family businesses are the foundation for authentic and regionally established tourism.

3.3.2 Steering sustainability within tourism enterprises

Promotion and support of tourism enterprises on sustainability issues

3.3.3 Employer branding and qualification

Strengthening employer brands and top training quality

3.3.4 Letting of private rooms and farm holidays

Necessary adaptations in the current amendment to the Private Lodging Act

3.3.1 Management of family businesses

Family businesses are the foundation for authentic and regionally established tourism.

The successful continuation of **family-run business structures** will be a decisive factor for tourism development in Tirol in the coming years. **The handover of around 2,600 enterprises** must be mastered over the next 15 years in order to maintain the family-oriented structure in Tirolean tourism that has enjoyed such great success for decades. Specific support measures under the direction of the **Tirolean Chamber of Commerce** include:

- Strengthening of companies' **resilience to crises** by increasing the equity ratio
- Strengthening **digitalisation competence** in family enterprises
- Boosting competence in the areas of **business management and succession planning,** especially for small businesses, in cooperation with the WIFI and the MCI Management Center Innsbruck and the University of Innsbruck respectively
- Sensitisation of businesses to the **handover process** and use of the young hotel and hospitality industry (JHG Tirol) as a **networking and communication platform** for those taking over the business.
- **Support** and **coaching** of businesses within the **advisory network of the Tirolean Chamber of Commerce** with an increased subsidy rate.
- Targeted and **practical research** on the management of family businesses

3.3.2 Steering sustainability within tourism enterprises

Promotion and support of tourism enterprises on sustainability issues

The tourism structure in Tirol, which still consists predominantly of small and medium-sized family-run businesses, represents **participatory** and **sustainable** tourism.

The management of sustainability at company level is based on the three classic aspects of **economic, social** and **ecological** sustainability. The aim is to create competitive enterprises that protect natural resources and are integrated into regional value chains. The enterprises should be given the best possible support and encouragement on the path to further sustainable development. Development and implementation of concrete **corporate sustainability strategies** in the three aspects of ecology, society and economy is essential. This is achieved through the Tirolean Chamber of Commerce advisory network, with the support of the Tirolean Advisory Fund. To this end, the increased **subsidy rate of 80% for the Tirolean advisory subsidy is to be continued until 2025.**

3.3.3
Employer branding and qualification

Strengthening employer brands and top training quality

Employer branding, i.e. the perception of tourism enterprises as attractive employers, depends partly on the **image of tourism,** which must be enhanced with suitable measures. Secondly, employer branding must also be professionally developed at company level. Leading tourism businesses in the province have already discovered this concept and are aware of how to position themselves. In order to promote the topic in all businesses, those responsible must be offered the opportunity to acquire the basic knowledge in a **compact training and further education programme.** This involves the **creation of training opportunities for the entrepreneurs** themselves, as well as **individual training and career paths** that develop employees into excellent skilled workers.

The extent and quality of education and training that tourism employees find in Tirol will be decisive in the future. This includes **simple training modules** in the form of e-learning courses and live online meetings. Furthermore, it is a matter of **complete vocational training programmes,** either in the area of regular apprenticeship training for young people *("Excellent Tirolean Apprenticeship Company")* or in the area of tourism vocational qualifications on the second educational path *("Talents for Tourism").* The latter programme in particular offers a unique and easy access to advancement from unskilled to skilled worker, while in an existing employment relationship.

All in all, Tirolean tourism has been excellently **positioned in the qualification sector** for many years, with **outstanding** and **internationally recognised educational institutions** ranging from **vocational schools** to **hotel management schools** and **tourism-specific universities.** These institutions should also be supported accordingly in innovative development measures.

3.3.4 Letting of private rooms and farm holidays

Necessary adaptations in the current amendment to the Private Letting Act

The current amendment to the **Act on the Letting of Private Rooms** adapts and expands the **hitherto restrictive limits** on the admissibility of **private room letting.** It is clarified that the apartments or other living quarters to be rented out must belong to the landlord's common household. This is in any case the situation if guests are accommodated in the same property as part of the landlord's household. They do not (no longer) have to be part of the landlord's dwelling.

To a very limited extent, services usually associated with the letting of private rooms and **those the guest expects** may be provided – such as the provision of table and bed linen, dishes, television or Wi-Fi, the shared use of communal lounges, the provision of additional rooms and additional services such as a playground or breakfast and bread delivery service. Private accommodation providers are now also allowed to use modern means of communication such as online media or social media channels to offer or advertise their services.

Farm holidays, as an authentic and highly demanded element of private room rentals, is an important asset in the Tirolean accommodation product range. Farmhouse rentals, (also alpine cabins), which has been practised for decades, should also continue to be protected by law.

The leeway created in the amendment to the Private Letting Act will enable private landlords to create **contemporary and competitive services** without the obligation to obtain a business licence.

"Tirolean tourism with its family-oriented structure is and remains a strong foundation of our province. It is a great challenge to inspire young people to work in the tourism and leisure industry. This requires attractive working conditions and excellent leadership skills."

Mario Gerber,
Tirol Tourism Board

"Family businesses are the DNA of Tirolean tourism. Therefore, measures to support the handover of businesses and professional coaching for young entrepreneurs are essential."

Martina Entner,
Tirolean Chamber of Commerce

3.4 COMPETENCE & INNOVATION LEADERSHIP

Tirol has lived with and from tourism for over 100 years. During this time, it was possible to build an unparalleled wealth of experience, especially when it comes to winter tourism and mountain sports. This competence, which has grown over decades, is reflected in year-round quality leadership and sustainable further development of the tourism services. Thanks to the family structures, it has also been possible to create a distinct sense of hospitality.

The perfect Tirolean holiday needs not only excellent establishments, functioning infrastructures, high quality in terms of what is offered and perfect service. Guests also look for opportunities for a genuine and individual quality experience as well as innovative, architecturally coherent and contemporary accommodation concepts. Tirol has also become a competence leader in tourism training and further education, ranging from apprenticeships to university studies.

It is our passion for winter sports that has transformed us into competence and innovation leaders in alpine tourism. Here in the birthplace of alpine skiing in St. Anton am Arlberg.

3.4.1
Quality leadership in alpine year-round tourism

Quality, innovation and greater appreciation of snow, or non-snow-based activities

3.4.2
Destination and community management

Strengthening the management of tourism associations in the Tirolean Tourism Act and (continued) active community management.

3.4.3
Core markets in Tirolean tourism

Near-European markets will remain the core tourism markets for Tirol in the future.

3.4.4
Research-led scope for innovation in tourism

Promotion of research-aided innovations for Tirolean tourism.

3.4.5
Digitisation offensive – smart destination

Tirol will become a driving force and pioneer of digitalisation (smart destination) in the Alpine region.

3.4.1 Quality leadership in alpine year-round tourism

Quality, innovation and greater appreciation of snow, or non-snow-based activities

Tirol is a recognised **competence- and innovation leader** in alpine tourism. In addition to comprehensive alpine competence, the high-quality and in many cases state of the **art transport quality of the cable cars** is a globally recognised unique selling point of Tirolean tourism. Well over 90 % of the new lifts installed in the past 10 years were high-quality replacement investments. Since 2005, the *"Tirolean Cableway and Ski Area Programme"* has refused permission for **any new ski areas to be created** and only permits the improvement of existing infrastructures and access routes, where they make sense and are ecologically compatible. Concrete solutions for **maintaining quality leadership** in alpine year-round tourism include:

- **Skiing** will always remain the key element of modern winter sports activities available in Tirol, but **winter activities** such as winter hiking, cross-country skiing, tobogganing and ski touring must also be given a greater focus.
- **Further development and stronger promotion** of "non-snow activities": Hiking will remain the key element of future activities in Tirol, especially in summer and autumn. Cycling – in all its many facets – will continue to grow in popularity. Booming climbing sports also offer new opportunities for Tirolean tourism. Increased promotion of "offers without snow" is of fundamental importance for further quality development.
- In the spirit of **equalising seasonal periods,** the following priorities will also be established:
  - Spring:
    - Sunshine skiing
    - Increased focus on existing potential for breaks com bined with public holidays in May/June.
  - Autumn: autumn hiking in conjunction, amongst other things, with traditional cuisine
  - Pre-Christmas period: Advent & Christmas markets
  - All year round: MICE (Meetings, Incentives, Conventions, Events)
- **Peace and relaxation** are central motives for a holiday in the mountains, which must be consciously addressed. For this reason, a voluntary volume restriction for outdoor sound systems on the mountain *("peace and quiet on the mountain")* is considered a quality feature.
- **Accessibility** is an essential element of comprehensive quality leadership. This involves **raising awareness for the needs of active people with mobility impairments.** A practical starting point is the inclusion of people with disabilities in the **planning and construction phases of leisure infrastructures** (e.g. cross-country skiing trails, hiking trails, bathing lakes,) as well as in the support of new job profiles for people with disabilities (e.g. in snow sports).

3.4.2
Destination and community management

Strengthening the management of tourism associations in the Tirolean Tourism Act and (continued) active community management.

Tirol is one of the pioneers in alpine destination management, which is why the ongoing transformation of classic tourism associations as marketing organisations into a **destination management organisation (DMO)** must be actively continued. Moreover, destination management is increasingly required to think beyond purely touristic activities for guests and visitors. This is associated with the following requirements:

- **Destination management and environment:** many tourism associations make significant contributions to the structuring of regional services. In addition to visiting guests, the regional population also uses such infrastructures and services. Tourism associations (continue to) actively participate in environment management within the respective destination, with a clear focus on **development of the regional leisure activities** offered and measures to **manage sustainability.** Coordination with the regional institutions involved (municipality, planning association, regional authorities) is essential to ensure effective implementation.
- **Position of the tourism associations' management in the Tirolean Tourism Act:** responsibilities of the management in the Tirolean Tourism Act (§ 17) should be consolidated and extended to include financial and legal powers.
- **Destination research:** goal-oriented and practice-oriented research in destination management with a focus on continuous **destination performance assessment** or **destination sustainability governance.**
- **Province of Tirol's Landlord Academy:** the professional support of tourism establishments in their efforts to introduce quality and professionalism to their businesses and to develop and market common products is continued at the highest level of quality. The Province of Tirol's Landlord Academy (in close cooperation with the Association of Tirolean Tourism Associations – VTT) – increases the **competitiveness of businesses** and destinations alike.

3.4.3 Core markets in Tirolean tourism

Near-European markets will remain the core tourism markets for Tirol in future.

With a share of around 80 % of overnight stays, the German, Dutch, Austrian and Swiss markets represent the most important source markets for Tirolean tourism. These European core markets continue to be the mainstay of tourism demands and have gained significantly in importance, not least due to the Corona pandemic. Especially in the home market of Tirol and Austria, it is important to make even better use of existing opportunities and potentials in the future by setting appropriate priorities. Further internationalisation should primarily serve the equalisation of seasonal periods and the best possible risk management in terms of diversification. Tirolean tourism will be represented on the relevant long-distance markets with concrete and target-group-specific offers, preferably in cooperation with the Austrian Tourist Board and the Austrian foreign trade offices, in order to make optimal use of synergies and to achieve a corresponding market impact. With a view to economic, social and ecological sustainability, communication efforts undertaken by Tirolean tourism are primarily directed at guests with the longest potential length of stay. In terms of resilience, it is important to maintain the high proportion of regular guests of 60 % in summer and 75 % in winter. Furthermore, those target groups that are of strategic importance for Tirolean tourism are primarily addressed. In addition to the classic leisure and holiday guests, business travellers and MICE customers represent an important target group in the B2B sector.

3.4.4 Research-led scope for innovation in tourism

Promotion of research-aided innovations for Tirolean tourism.

Innovations and continuous improvements are central factors for the sustainable competitiveness of Tirolean tourism, which is in intense competition with other Alpine regions. The needs of guests are constantly changing and innovation cycles at company and destination levels are becoming increasingly shorter. In order for innovations in tourism to be sustainable and to strengthen the competitiveness of a destination accordingly, a close link between innovation and research is required. The further development of Tirolean tourism should therefore be based on **research-led innovation concepts.** Specific starting points for this include:

- Development of a **dashboard for Tirol** with multi-dimensional key performance indicators (KPIs) for measuring success and transparent, fact-based presentation of tourism development.
- Scientifically based research on **regional cuisine and food production,** in which origin and quality are key success factors.
- A **health-scientific development** of services with a focus on exercise and nutrition.
- **Data-driven snow management** and ongoing innovations in technical snowmaking (Tirol Snow Centre) for environmentally conscious winter tourism.

3.4.5 Digitisation offensive – smart destination

Tirol will become a driving force and pioneer of digitalisation (smart destination) in the Alpine region.

Tirol's tourism is a regional driving force in the field of digitalisation and at the same time part of a global transformation. Tourism is one of the sectors that has been and continues to be most profoundly and rapidly influenced by digitalisation. Digital usage and leisure behaviour of guests and locals is changing, as are the technical possibilities that open up new opportunities for tourism in Tirol. Resulting data should be actively used and data-driven management for ascertaining demand as well as supply makes it possible to offer guests additional benefits through a needs-oriented and individualised structuring of services.

On the **demand side,** the digital collection, evaluation and accessibility of information is of great importance in order to generate demand for a smart destination. The promotion of digitalisation and, as an example, the linking of guest, advantage and loyalty cards also leads to a broad database. This database enables the development of an open digital data infrastructure, as well as documented stable interfaces under the title **"Open Data Hub Tirol"** in order to be able to manage the holistic and high-quality mapping of the tourism infrastructure (geodata pool, interactive map). Building on this, data-driven visitor management (digital routing) in the areas of arrival, transport and leisure can be used to equalise and evenly distribute demand within the smart destination. Furthermore, with the help of a broad database, an experience-oriented, online bookable presentation of services under the title **"Tirol Experience Platform",** tailored to the needs of the guest, can in turn create the prerequisites for the formation of a smart destination. Development towards a smart destination in terms of services offered, includes the further development of **digital competence** in Tirolean tourism businesses and regions with the help of a **"data steward system,"** in cooperation with the NETA (Next Level Tourism Austria) initiative launched by the Austrian National Tourist Office. In order to consolidate and deepen this digital competence and create impetus for innovations, a cooperatively organised **"Tourism Tech Innovation Lab"** is yet another systematic step towards becoming a smart destination. One result of this jointly developed competence is to include **dynamic quality and value-added monitoring,** which includes the development of a system for assessing prices, supply, demand and customer satisfaction, which consequently boosts direct sales.

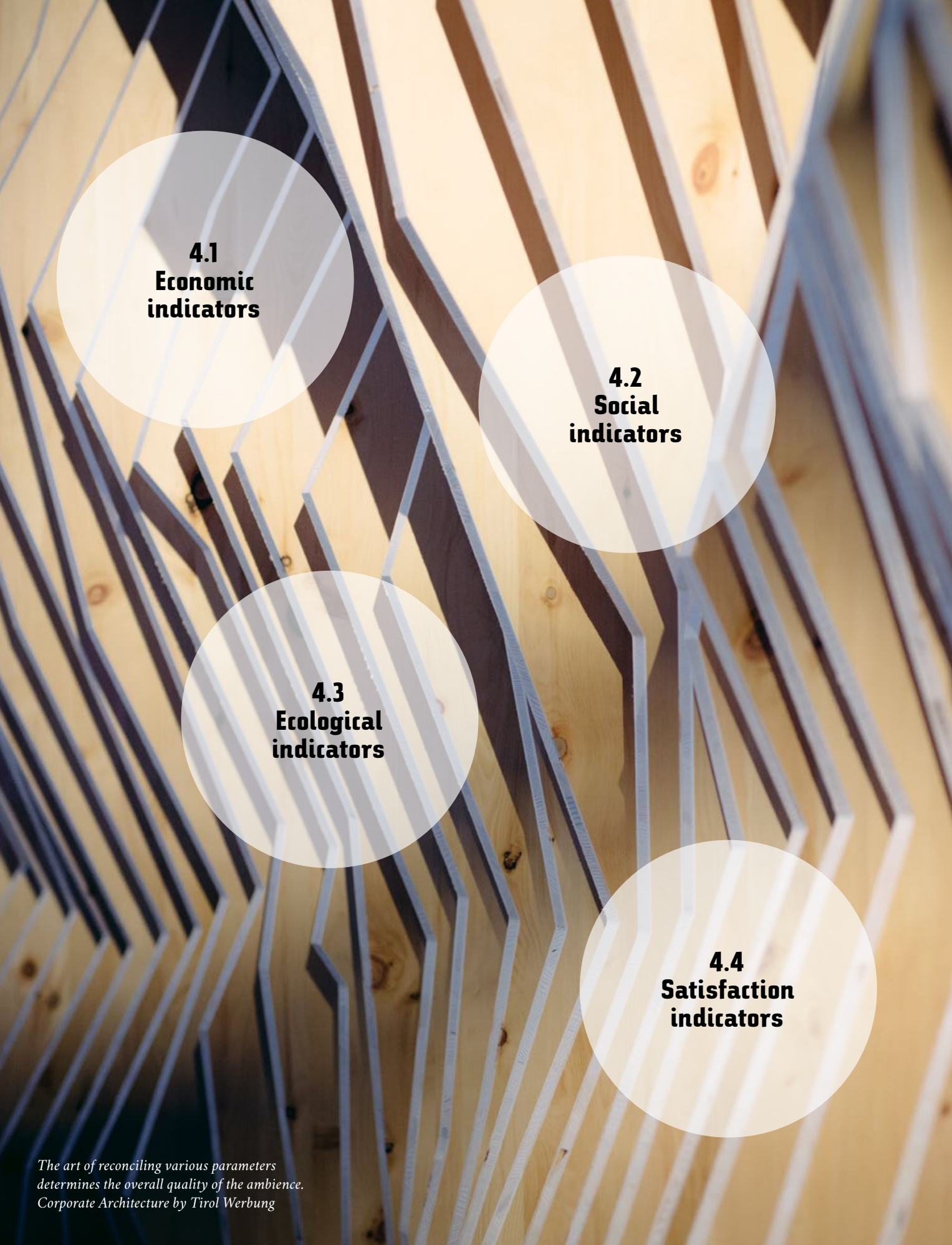
By linking the demand and supply aspects, a further development of the **electronic reporting system** will provide a reliable data and information basis that allows for quick action in times of necessity (e.g. in the case of evacuations in the event of a catastrophe).

"Tirolean tourism has developed successfully over many decades and is characterised today by the highest level of competence in terms of competitiveness. The key now will be to maintain this strong position in the face of the new challenges – value instead of quantity, sustainability!"

Franz Tschiderer,
Tirol Tourism Board

"The need for holistic health is greater than ever. Thanks to its topography, climatic conditions and wide range of opportunities for active exercise in nature, Tirol offers perfect conditions for healthy living and holidays in the heart of the Alps. It is essential to make even greater use of this potential in future by means of appropriate product development throughout the year."

Ingrid Schneider,
Tirol Werbung



The art of reconciling various parameters determines the overall quality of the ambience. Corporate Architecture by Tirol Werbung

4

Multidimensional evaluation of success in Tirolean tourism

Dashboard Tirol for multi-dimensional performance assessment and transparent or fact-based presentation of tourism development.

In order to assess and continuously evaluate the processes in Tirolean tourism, it is necessary to establish central performance indicators. A holistic survey, which leads to a more detailed overall picture and a so-called Smart Destination, requires a combination of classic established parameters (overnight stays, arrivals, average length of stay) as well as new significant parameters. The destination criteria of the Global Sustainable Tourism Council (GSTC-DC), which were developed on the basis of the Sustainable Development Goals (SDGs) of the United Nations, represent parameters that reflect the tourism development process in the areas of economy, society, ecology and satisfaction. With the inclusion of such indicators, measurable, evaluable, comparable and easily understandable information can be made available to the general public in order to make collective, targeted decisions on the basis of this information and to embark on future-oriented strategies. This monitoring of Tirolean tourism subsequently contributes to a better understanding of the tourism industry, while providing a data- and evidence-based governance of fundamental tourism processes. This ensures the development of Tirol as a smart destination, enabling future potentials and opportunities to be recognised immediately and implemented quickly and effectively in a constantly changing market. Special key measures under the guiding principles of the four major pillars of the Tirolean Way can also be objectively evaluated and regulated.

Among a multitude of parameters, individual top key performance indicators (KPIs) are defined and explained below. The inclusion of further parameters in a system of multi-dimensional performance assessment in Tirolean tourism in the context of a Dashboard Tyrol is possible at any time.

4.1 Economic indicators

Overnight stays
The total number of overnight stays produced by guests at municipality, destination or Tirolean level (per month, quarter, season, tourism year, calendar year).
International key indicator systems:
GSTC-DC – A3 & A8; SDG – 11 & 12

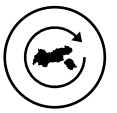
Arrivals
The total number of guests who have spent at least one overnight stay, irrespective of the total length of stay, in a municipality, destination or in Tirol (per month, quarter, season, tourism year,
calendar year),
International key indicator systems:
GSTC-DC – A3 & A8; SDG – 11 & 12

Average length of stay
Number of arrivals in the municipality, destination or in Tirol in relation to the total number of overnight stays (per month, quarter, season, tourism year, calendar year).
International key indicator systems:
GSTC-DC – A3 & A8; SDG – 11 & 12

Bed occupancy rate
Ratio of the achieved bed occupancy compared to the notionally possible full bed occupancy (calculation on the basis of 365 days or the sum of open days per month, quarter, season, tourism year, calendar year).
International key indicator systems:
International key indicator systems:
GSTC-DC – A3 & A8; SDG – 11 & 12

Turnover per bed or per overnight stay
Total turnover of tourism key service providers divided into the number of beds or overnight stays in the municipality, destination or in Tirol (per month, quarter, season, tourism year, calendar year).
International key indicator systems:
GSTC-DC – A3 & B1; SDG – 8, 9 & 12

4.2 Social indicators



Tourism intensity
Ratio of the total population to the number of overnight stays in the municipality, destination or in Tirol (per month, quarter, season, tourism year, calendar year).
International key indicator systems:
GSTC-DC – B1; SDG – 8 & 9

Tourism awareness (perception) of the local population
Gauging the perception and attitude of the local population towards tourism in Tirol as well as creating a general mood among the population regarding tourism development.
International key indicator systems:
GSTC-DC – A5; SDG – 11 & 17

Proportion of year-round jobs in tourism
Ratio of the number of year-round jobs compared to the number of full-time equivalent jobs in tourism.
International key indicator systems:
GSTC-DC – A3 & B2; SDG – 4,5,8 & 10

4.3 Ecological indicators

Tourism carbon footprint
Calculation of the tourism CO^2 footprint per visitor or per overnight stay in Tirol.
International key indicator systems:
GSTC-DC – D5 & D10; SDG – 7 & 13

Proportion of public transport used for on-site mobility
Ratio of the distance travelled by local public transport (LPT) or frequency of use of LPT during the stay to the distance travelled, or frequency of use of individual means of transport during the stay in the municipality, destination or in Tirol (per month, quarter, season, tourism year, calendar year).
International key indicator systems:
GSTC-DC – D5 & D10; SDG – 7 & 13

Percentage of renewable energy consumption in tourism
Ratio of energy consumed produced from renewable energy sources compared to total energy consumption. Review of the energy mix in tourism in Tirol.
International key indicator systems:
GSTC-DC – D5 & D10; SDG – 7 & 13

4.4 Satisfaction indicators

Guest satisfaction
Assessment of guest satisfaction and associations with Tirolean tourism and the local holiday experience.
International key indicator systems:
GSTC-DC – A6; SDG – 11 & 12

Net Promoter Score (recommendation rate)
Evaluation of the recommendation rate among guests by means of a standardised Net Promoter Score.
International key indicator systems:
GSTC-DC – A6; SDG – 11 & 12

Employee satisfaction
Assessment of the perception and attitude of employees in Tirolean tourism and the creation of a "mood" or "image" of Tirolean tourism as an employer.
International key indicator systems:
GSTC-DC – A5 & A6; SDG – 11, 12 & 17

5

The Tirolean Way as a process

5.1 The Tirolean Way will never end

The search for the best way never ends. It is based on an ongoing process of achieving goals, while constantly adapting to changing circumstances and conditions. The Tirolean Way can also be regarded as an iterative process, in which learning experiences made along the way are systematically evaluated on a regular basis and integrated into the ongoing process. In this way, the guiding principles associated with the four major pillars are constantly being developed, while generating new measures in their own right. Seen in this light, the current Tirolean Way – Perspectives for Responsible Tourism Development – represents a strategic snapshot that requires continuous further development. The shorter these optimisation and adaptation cycles, the more dynamic and future-oriented this Tirolean Way will be.

5.2 Dialogues, expert discussions and surveys

Development of the Tirolean Way is always linked to exchanges with numerous partners and interest groups in tourism and outside the sector. Dialogue formats with central core service providers and stakeholders in Tirolean tourism are conducted on an ongoing basis. Another important aspect is the interaction with people who provide a critical perspective on the development of tourism in Tirol and those who enrich the process with an external perspective.

More than 100 experts were involved in this Tirolean Way through expert interviews, analysis and panel discussions. This was accompanied by two specific surveys on tourism development in Tirol that were conducted among core service providers and the Tirolean tourism associations. We would like to take this opportunity to thank all participants for their time and valuable contributions

The insights of numerous studies and concepts were also incorporated. These include, for example: Tourism Awareness in Tirol, MCI, 2019; Quality of Life Index Tirol, University of Innsbruck and MCI, 2019; Tourism & Agriculture – Cooperation and Conflict Potentials in Land Use, MCI, 2020; Destination Performance Tirol, MCI, ongoing; T-Mona Tirol; Mountain Profile Study Summer Holidays in the Mountains, MCI, 2014; Tirolean Way 2021; Brand Manual Tirol; Spatially Compatible Tourism Development Tirol (2010) and current evaluation report; Plan T – Master Plan for Tourism, BMLRT; United Nations Sustainable Development Goals (SDGs); Global Sustainable Tourism Council Destinations Criteria – GSTC-DC.

The Tirolean Way …

SELF-CONCEPTION
Tirol perceives itself as …

- A balance of economic, social and ecological sustainability.
- The best combination of nature, sport and mountain experiences worldwide.
- The very epitome of alpine lifestyle.

FOUR MAJOR PILLARS & GUIDING PRINCIPLES
The strategic orientation

- Living & Recreation Space
- Sustainability & Regionality
- Family Businesses & Consummate Hosts
- Competence & Innovation Leadership

Guiding principles of the four major pillars

MULTI-DIMENSIONAL EVALUATION OF SUCCESS
The top key figures

- Economic indicators
- Social indicators
- Ecological indicators
- Satisfaction indicators

Dashboard Tirol parameters

… is a process.

The Tirolean Way: “A pioneering strategy of forward thinking, occasional inconvenience, intelligence and active design to increase values generated by tourism in harmony with nature.“

Tirolean Way 1991, S.5