



## UNWTO Network of Observatories (INSTO)

### Destination Profile<sup>1</sup>

#### South Tyrol

#### [the Italian Autonomous Province of Bolzano/Bozen – Alto Adige/Südtirol]

In addition to the Membership Application Form, please provide UNWTO with the following information:

DESTINATION PROFILE			
1	Is/Are there Tourism Satellite Account/s (TSA) in the destination country/ies, measuring the economic dimensions of tourism at national level?	<input checked="" type="checkbox"/> YES Last time a TSA was conducted: 2012 for Italy (2010 data), 2009 for the Autonomous Province of Bolzano/Bozen (hereafter South Tyrol) (2005 data)	<input type="checkbox"/> NO
2	Sector relevance: Contribution of (a) tourism and (b) other economic sectors to the national (and if available local) GDP (%) – latest figures	a) Italy: 11.8% (2016 data). Bolzano Province: 10.71% (2015 data) b) Italy (2016 data): Agriculture, forestry & fishing: 2.05% Industry: 23.45% Services (including tourism): 74.5% Bolzano Province (2015 data): Agriculture and forestry: 4.56% Industry: 23.89% Services (including tourism): 71.55%	
3	Arrivals of inbound (non-resident) visitors for last three years – Thousands	Annual arrivals in Bolzano Province (2015 data): 4,188 Annual arrivals in Bolzano Province (2016 data): 4,561 Annual arrivals in Bolzano Province (2017 data): 4,739 Total annual arrivals (2015-2017 data): 13,488  Same-day visitors: 2,620 (2005 data)	

<sup>1</sup> Wherever needed, destinations are asked to provide regular update.

3.1	Percentage of total annual arrivals of inbound (non-resident) visitors occurring in peak month and in peak quarter (please indicate which month and quarter)	Peak month = (August) Percentage = 11.61 % (2017 data, in proportion of the overall annual arrivals of inbound visitors) Peak quarter (July-August-September) Percentage = 37.92% (2017 data, in proportion of the overall annual arrivals of inbound visitors)
4	Trips of domestic visitors for the last three years – Thousands	Annual trips of domestic visitors in Bolzano Province (2015): 2.308 Annual trips of domestic visitors in Bolzano Province (2016): 2.441 Annual trips of domestic visitors in Bolzano Province (2017): 2.563 Total annual trips (2015-17): 7.312 Same-day visitors: not available
4.1	Percentage of total annual trips of domestic visitors occurring in peak month and in peak quarter (please indicate which month and quarter)	Peak month = (August) Percentage = 20.14 % (2017 data, in proportion of the overall annual trips of domestic visitors) Peak quarter (July-August-September) Percentage = 39.99% (2017 data, in proportion of the overall annual trips of domestic visitors)
5	Tourism industries: accommodation for visitors in hotel and similar establishments - Units	Number of establishments: 10,237 (2017 data) Total rooms: 73,169 (2016 data; accommodation providing catering services only) Total bed-places: 223,987 (2017 data)
6	Current top 5 primary source markets for the destination	Germany, Italy, Austria, Switzerland & Liechtenstein, BeNeLux
7	Please describe the destination's experience with other monitoring initiatives/systems	◆ ASTAT - the Institute of Statistics of Bolzano Province - gathers monthly data about tourist flows in the territory, which are available online in form of interactive tables. Moreover, since 1995, every five years ASTAT implements and publishes a household survey with focus on income and pecuniary circumstances. The last household survey was published in 2015, the next one will be conducted in 2019 and published in 2020. ASTAT - together with Eurac Research - also introduced a periodic guest observation survey (Gästebarmeter) that investigated the spending behavior and customers' price fairness perception. The last survey report was published in 2012/2013. Currently the initiative stopped, but is planned to be

		<p>continued in the future. ♦ The Institute of Alpine Environment of Eurac Research in collaboration with the Institute of Economic Research of the Chamber of Commerce and the Environmental Agency of the Province of South Tyrol launched a Monitoring Initiative in 2001 called "Sustainable South Tyrol". The Initiative constantly monitors the sustainable development of the 116 municipalities of South Tyrol. The issue areas include water, air, biodiversity, land use, energy, waste, traffic, labor market, corporate structures (enterprises), tourism, agriculture, demographics/population, education, politics, social care, housing and commuting. ♦The Sentinel Alpine Observatory (SAO) is an environmental monitoring/remote sensing initiative implemented by the Institute of Earth Observation of Eurac Research. The project develops innovative methodologies for applying the new sensor technology on board of the Copernicus Sentinel satellites with the aim to create multi-temporal datasets of biophysical and descriptive variables that cover the entire alpine range. SAO aims at becoming a networking platform for users of earth observation data in the alpine region. Issue-specific maps are provided to the users through a web GIS platform. ♦ For the future, Bolzano Province together with the other four Provinces that share the Dolomites UNESCO world heritage site – in cooperation with the UNESCO Dolomites Foundation - are currently exploring the possibility to set up an overall monitoring system with focus on the protected areas located within the UNESCO natural heritage site. Points of interest include the monitoring of growing visitor pressure, the definition of carrying capacities, the monitoring of (endangered) key species and the management of visitor flows.</p>	
8	Are there strategies in place for sustainable development of the destination?	<input checked="" type="checkbox"/> YES Name of those of relevance: The tourism development strategy	<input type="checkbox"/> NO

		<p>„Zukunft Tourismus Südtirol 2030“ (issued in 2017) analysis the status quo of tourism in South Tyrol, captures its current trends and proposes a set of development measures until 2030. Large parts of the measures and their related sub-activities focus on sustainable tourism development topics.</p>	
9	<p>Please specify if there are any other initiatives/projects of relevance for the Observatory in the destination (and which)?</p>	<p>◆ Several sustainability initiatives have been initiated in South Tyrol during the last few years. Below is a list of outstanding and pioneering initiatives in the tourism sector or initiatives that strongly affect it. They can be divided into strategical frameworks, networking initiatives, (voluntary) schemes for certification, and initiatives for product distribution. ◆◆</p> <p><b>Strategical framework: ◆ Alpine Convention's working group on sustainable tourism.</b> The Alpine Convention is an international treaty between eight alpine countries. Within this framework agreement, the working group on sustainable tourism addresses two core issues: the greening of alpine tourism, in particular through the reduction of CO2 emissions from the tourism sector and the identification of strategies for innovating touristic products in Alpine destinations. ◆</p> <p><b>Dolomites UNESCO Strategy:</b> In 2009, the Dolomites became part of the UNESCO world natural heritage. In 2016, the heritage site adopted an Overall Management Strategy, which is shared between the institutions and territorial authorities of the 5 Italian Provinces sharing the Dolomites, including the Province of Bolzano (South Tyrol). The strategy focuses on actions aimed at conserving, communicating and enhancing the property. ◆</p> <p><b>Energy &amp; Climate Plan South Tyrol 2050 (KlimaLand Südtirol).</b> This provincial strategy sets the goal to constantly reduce the per capita energetic consumption and the CO2 per capita emissions. Focus lies on the use of renewable energies instead of fossil fuels, on promoting a new culture of</p>	

		<p>sustainability and on participating in national, international and cross-border development strategies and programs. ♦ ♦</p> <p><b>Networking initiatives:</b> ♦ „Green Mobility“ network. Green Mobility is an initiative of the Province of Bolzano and is coordinated by STA - Strutture Trasporto Alto Adige SpA/Südtiroler Transportstrukturen AG. The project was launched with the ambition of transforming South Tyrol into a model region for sustainable alpine mobility. The aim is therefore to include the development and coordination of all forms of sustainable mobility, as well as paving the way for new and innovative projects. The initiative connects different players at the interface between research and practice, enabling innovation in sustainable mobility. ♦ <b>Under Construction.</b> Under Construction is a school for sustainable innovation developed by Eurac Research and IDM that aims at linking researchers, professionals and accommodation facilities under the common challenge of building sustainable hotel comfort. The school involves 12 young architects or engineers who work in cooperation with SMEs and researchers to increase thermal comfort and reduce energy consumption under the common framework of sustainable development. ♦ ♦ (Voluntary) schemes for certification ♦ <b>Klimaneutralitätsbündnis 2025.</b> The Alliance for Climate Neutrality is an initiative that aims at making business activities climate neutral within 2025 in order to contribute to solving the global climate problems. Those businesses and institutions that actively commit to the alliance – and thus to reducing CO2 emissions commit themselves to regular measurement, reduction, compensation, certification and communication. ♦ <b>Climate House Agency.</b> It is a public agency of the regional government that certifies the adoption of energy saving building construction methods in South Tyrol. Besides certifying the energy savings of hotels, wine cellars, schools, homes, it also develops research projects and it promotes awareness-raising campaigns</p>
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		<p>for local inhabitants on climate change issues. ♦ <b>GreenEvent certification.</b> GreenEvent is an initiative promoted by the Province of Bolzano to increase the sustainability of (tourism) events; it certifies those events that are planned, organized and realized according to sustainability criteria. The focus is on ecological products, energy efficiency, waste management, valorization of local products and social responsibility. ♦ <b>Sustainability check.</b> HGV, the South Tyrolean association of hoteliers and restaurants, in cooperation with TourCert and Terra Institute plans to promote an initiative verifying the degree of sustainability of hotels and restaurants in South Tyrol (sustainability check) and support them on their ways towards TourCert certification. ♦ ♦ <b>Initiatives for product distribution:</b> ♦ <b>Pur Südtirol</b> is a private organization with the goal to promote sustainable cultivation, production and consumption of wine and food in South Tyrol. The organization owns a network of shops spread over several towns in South Tyrol, that work as distribution channels for regional products. ♦ <b>Roter Hahn.</b> The South-Tyrolean Farmers' Association (SBB) runs the marketing trademark "Roter Hahn" (red rooster) which focuses on farm holidays. Farmers who provide agritourism accommodation can receive the red rooster classification ranging from 1 - 5 flowers. Every farm applying for the red rooster is checked according to a list of <b>service quality based criteria.</b> ♦ <b>The fruits and vegetables farmers' co-operative Bio Vinschgau (VI.P) (bio Val Venosta)</b> represents the interests of member farmers in the valley "Val Venosta", western South Tyrol. The co-operative's main aim is to support its members with joint storing, processing, sales and marketing. It also promotes the improvement of product quality and environmentally friendly production. ▯</p>	
11	DMO(s) in monitoring area: Yes/No and year of establishment	<input checked="" type="checkbox"/> YES Year of establishment:	<input type="checkbox"/> NO

		<p>Former tourism organization SMG (South Tyrol Marketing Association) founded in 1999, after restructuring process denominated IDM Südtirol – Alto Adige in 2017 (abbreviation for innovation, development and marketing). IDM has three sub-regional DME's (destination management entities) which are operational since 2018. Tourism associations at municipality level implement strategies locally.</p>	
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