

Announcement of Tender

PR and MEDIA for Great Britain

Società Alto Adige Marketing (SMG)

Agency briefing

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1. The Contracting Company and tourist destination, South Tyrol

1.1 Contracting Company

The company Società Alto Adige Marketing (SMG) is a privately run company working on behalf of the Autonomous Province of Bolzano, with the appointment to promote the marketing – in Italy and abroad - of South Tyrol, working closely with tourist associations, the different producers of South Tyrol specialities and entrepreneurial associations, following precise strategic directives. Since 2005 this task has been made easier with shared use of the so-called “umbrella mark” of South Tyrol.

SMG plays a significant role in looking after the image of the province of Bolzano and the way in which it is perceived in tourists' countries of origin and by clients of South Tyrolean products. As well as managing the main markets, i.e., Germany, Italy, Austria and Switzerland, SMG also has the task of acquiring new markets and new groups of users.

In quality terms, in 2010 South Tyrol recorded 28,583,553 tourists, which is a total of 5.6 million arrivals and average stays of 5.0 days.

1.2 South Tyrol as a tourist destination

The particular features of South Tyrol

South Tyrol is on the northern edge of Italy, but until the First World War, it was part of the Austro-Trentino, alongside which it is one of the five special statute regions in Italy. In South Tyrol, people, nature and culture all play a significant role. The people of South Tyrol have a determined character; they are pleasant but never superficial, and always genuine and sincere. South Tyrol is also synonymous with its variety of languages (Italian, German and Ladin), its Italian atmosphere and the forthrightness that is typical of Alpine folk. What is more, South Tyrol is an area that is rich in traditions and which today, still continues to affect the mentality and behaviour of its inhabitants. As far as concerns the climate, South Tyrol can boast an average of 300 days of sun every year, something that works to the benefit to the natural surroundings, which offer both rugged mountain scenery and vine-covered hillsides.

Tourist position

South Tyrol is an alpine tourist destination but one with Mediterranean charm. The cuisine of South Tyrol, considered as excellent by everyone, is a fantastic symbiosis of traditional Alpine cooking and the refinement of Italian food. This symbiosis between North and South is reflected in many other facets of the area, its landscape, the character of the people and the relations between nature and culture.

South Tyrol is a hospitable area, where people from the most disparate places have travelled through and met up with others, also because the Brenner is the lowest and easiest pass in the chain of the Alps.



South Tyrol has much to offer, including weather that will allow you to make the most of the area. When it comes to cuisine, the typical produce of South Tyrol is an excellent base for a period of time dedicated to pleasure: just think of the apples (considered to be among the best in the world and holders of European certification), the wine (as a ratio of wine-growing surface area, South Tyrol has the highest percentage of DOC wines and “three glasses” ratings from *Gambero rosso*, the Italian food and wine magazine), the dairy products from the best mountain farm milk, many types of bread (including the famous *schüttelbrot*), not to mention the Speck, smoked ham which is protected with European marking.

South Tyrol also has a high concentration of famous restaurants that have been included in various international guides.

“South Tyrol is a symbiosis of contrasts, between the Alpine and the Mediterranean, spontaneity and reliability, nature and culture.” This is the best way to describe the typical nature of South Tyrol and the way it differs from other competing tourist destinations.

Different market research has shown three bands of user to consider as priorities for South Tyrol: the hedonistic tourist, the dynamic tourist and family tourists.

Hedonistic tourist:

For the hedonistic tourist, or in other words, the tourist interested in pleasure in the broad sense of the word; the best calling card for South Tyrol is its cuisine, an effective fusion of alpine cuisine and the refined dishes of Italy (not for nothing can we sum it up in the motto: “*canederli and spaghetti*”).

No other area in the Alps stands out like South Tyrol for the appeal of typical cuisine served with excellent wines and enhanced with such a wide variety of typical produce.

The hedonistic tourist is interested in culture and greatly appreciates the overlap between the mountain lifestyle and that of the Mediterranean. For example, they enjoy traditional Alpine wellness centres (hay baths, mountain pine baths, etc), traditional crafts, the uses and customs of rural areas, but also the Mediterranean charm of the towns and cities in South Tyrol with their boutiques, wine shops, porticoes and markets.

Families:

South Tyrol is a very attractive tourist destination for families. The setting, farming culture, hospitality and many tourist facilities run “by families, for families” are the best possible base for holidays to be enjoyed to the full with lots of variety. The presence of many hotels specialising in families and children, and the agritourism facilities or farm hotels) and a host of other ideas for groups with children! South Tyrol can boast the best conditions for this user group, even in terms of infrastructure.

Dynamic tourist:



With the many opportunities on offer, South Tyrol is an ideal destination for dynamic, active sports tourists who enjoy nature as well as the possibility to combine this with typical locally-grown produce.

During the summer months, the most popular activities for this group would seem to be hiking in the unspoilt surroundings, making the most of a capillary network of perfectly marked routes and trails, as well as the peerless natural monument that is the Dolomites (UNESCO World Heritage Site since 2009).

In winter, there is skiing for everyone in the largest, most varied ski carousel the world has ever seen (suffice to mention the Dolomiti Superski consortium) with 1,200 km of ski runs available. The dynamic tourist will also find an added value that is always appreciated: the top-level cuisine that, in South Tyrol, can satisfy the tastes and requests of even the most demanding visitors in the area's many mountain huts and refuges.

2. The British tourist market for South Tyrol

As a tourist country of origin, Great Britain has had an important role for South Tyrol for many years. Currently, British tourists make up some 0.6 % of total visitor numbers over the course of a year and 55% of these visit South Tyrol in the winter and 45% during the summer months.

In 2010, 31,184 visitors from Great Britain were recorded for the province of Bolzano, which is 6.2% up on the figures for 2006. The total number of visitors was 162,996, which is a 5.6% increase compared to four years previously. On average, in 2010, British tourists spent 5.2 nights in South Tyrol.

South Tyrol's main competitors on the tourist market are above all several alpine regions in Switzerland and Austria (Tyrol, Graubünden, Carinthia, Salzburg) or in Italy (Trentino and the Aosta Valley). As a tourist destination, South Tyrol needs to highlight the differences that allow it to stand out from its competitors. As things stand currently, in the Britain, South Tyrol is still a destination that is not very well known or requested and based on the similarity of the names, it is often associated with the Austrian TYROL.

South Tyrol appeals to the following tourists from Great Britain:

Tourists who love to discover new things (18% of the population)

- » Adults from medium-high social background.
- » People who love spectacular views
- » People who enjoy trying new things
- » People who don't like all-inclusive package deals
- » People who like to enjoy themselves
- » People who like to immerse themselves in local culture
- » People who are always looking for surprises.

Cosmopolitan tourists (15% of the population)

- » People from a medium-high social background, aged from 25 to 44



- » People who love fun
- » People who prefer to avoid the beaten track when it comes to tourist destinations
- » People who ask for advice
- » People who love to try out new things and stay outside the crowd.

Source: Arkenford, 2008.

The key messages to convey to the British market are:

FOR THE WINTER SEASON

South Tyrol: refined good taste for a holiday on the snow

South Tyrol can be considered the ideal tourist destination for medium-level skiers looking for the genuine skiing holiday experience, well away from the ski resorts usually packed with British holidaymakers and completely the opposite of the anonymous, gaudy and chaotic ski resorts. It is important to underline the differences between South Tyrol and the skiing areas in countries such as France, Switzerland or Austria.

1. Quality you can afford

- The ski equipment available for hire in the resorts of South Tyrol is top quality but at decidedly competitive prices.
- Accommodation is almost always in the form of small hotels of the highest level with an excellent quality-price relationship and perfect for families, couples or the single traveller.
- Flights and shuttle services are available at reasonable prices

2. Large, cutting-edge skiing areas

- In South Tyrol there are more than 500 km of ski runs, all connected to one another without any need to take a car or bus.
- The Plan de Corones and Ladin valley areas have more than 35 ski lifts.
- It is also possible to purchase Dolomiti Superski passes to access the world's largest ski carousel, with 460 lifts and 1,200 km of ski runs, all with a single card.
- The same *ski pass* can be used on the famous Sella Ronda, a circular itinerary, 26 km long, which wends its way around the spectacular Sella Mountain and connects four Dolomite valleys, including the Gardena and Badia Valleys.

3. Guaranteed snow

- South Tyrol can guarantee snow-covered pistes that are suitable for skiing four months every year.
- 90% of the ski runs in South Tyrol are at altitudes above 1,500 metres.
- Techno Alpin, which is located in South Tyrol, is the world *leader* in the artificial snow.
- The artificial snow and piste management machinery in use in South Tyrol is thought to be the best in the Alps.



4. Quality levels

- Almost all of the hotels are family run, offering tailored services and with English-speaking staff.
- Ski instructors also speak English.
- The hotels are not situated in artificial tourist areas but in real towns and villages, where local people reside and therefore, the experience of the area will be an authentic one.

5. Culture

- Emphasis, first and foremost, should be placed on cuisine, such as the renowned dining in Alta Badia or the Mediterranean fish available in all restaurants on the pistes and the Michelin Guide restaurants and mountain refuges.
- South Tyrol is an area that needs to be discovered in full, including its spa centres that are inspired by local traditions.

FOR THE SUMMER SEASON

South Tyrol: refined good taste for a mountain holiday

1. Quality you can afford

- Accommodation is almost always in the form of small hotels of the highest level with an excellent quality-price relationship and perfect for families, couples or the single traveller.

2. Widespread variety

- The landscape of South Tyrol is varied, ranging from the spectacular high mountain scenery to mountain pastures, vineyards and even Mediterranean palms.
- There are many available activities: excursions at high altitude, easy tooled routes for beginners, difficult ascents for the expert climber or spectacular ones for mountain bikers.
- There are 11,000 km of trails in South Tyrol, all just waiting to be discovered.
- Wherever you go, you will find eateries and refuges in which to savour tasty snacks.

3. Accessibility

- From Great Britain, there are low-cost flights and shuttle services
- Even at altitudes of over 1500 metres, places can be accessed and are lived in during the summer months, such as family-run farms. There are also many occasions for solitary excursions in unspoilt natural surroundings.

4. Quality levels

- Almost all of the hotels are family run, offering tailored services and with English-speaking staff.
- The hotels are not situated in artificial tourist areas but in real towns and villages, where local people reside and therefore, the experience of the area will be an authentic one.

5. Culture



- Widespread spa and wellness centres, offering typical treatments for the area (e.g., hay baths).
- Cuisine that is a perfect blend of Mediterranean and Tyrolean specialities. South Tyrol is also home to many famous restaurants which are mentioned in the Michelin Guide, while some of Italy's finest wines are grown and made in the area.
- South Tyrol stands out for its eclectic mix of different cultures, which is experienced in its cuisine, in the inhabitants, architecture, language and many other ways besides.

