

Schweiz.

Agenda



- 1. Opening
- 2. Strategy Update & Outlook | Annika Grünig
- 3. City Campaign 2021 | Oliver Nyffeler
- 4. Deep Dive: Segment City Breaker & Culture Traveller
- 5. City-Hotel Push
- Signature Experience
- Offer marketing
- 6. General Inputs & Conclusion
- 7. Q & A



City-Breakers as an opportunity for the city hotel.

Webinar City Marketing, 25. February 2021

Rules of the game.



1. Questions can be asked in the Q&A box, they will be answered at the end



- 2. If there is not enough time to answer all the questions, we will reply in writing after the session
- 3. The session will be recorded and can be rewatched shortly after the presentation on <u>www.stnet.ch/city-push</u>



Strategy Update & Outlook 2021.

Annika Grünig

What lies behind?

Key Figures 2020

Overnight figures 2020:

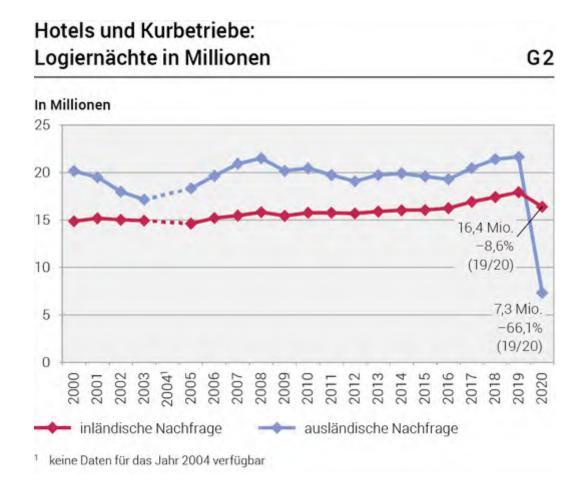
Gesamt / total: - 40 % Schweiz / Suisse: -9 % D/F:-40% Restliches Europa / reste de l'Europe: -57 % Americas: -83 % Asia, GCC, AUS / NZ: bis zu / jusqu'à -93 %

Neighbouring Countries Comparison:

Switzerland: - 40% Austria: - 48% Germany: - 45% (Jan. – Nov..) Italy: - 55% (Jan. – Oct.) France: - 48% (Jan. – Sept.)



Development of overnight stays by origin of guests.

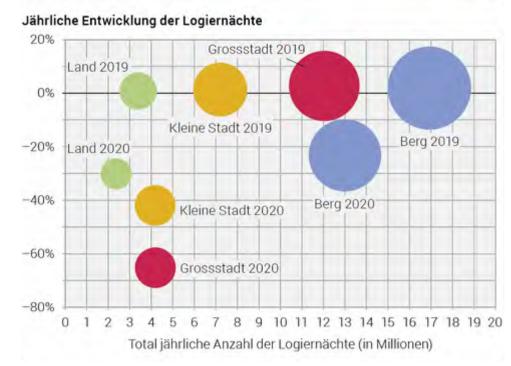




Development of overnight stays by ST zones*

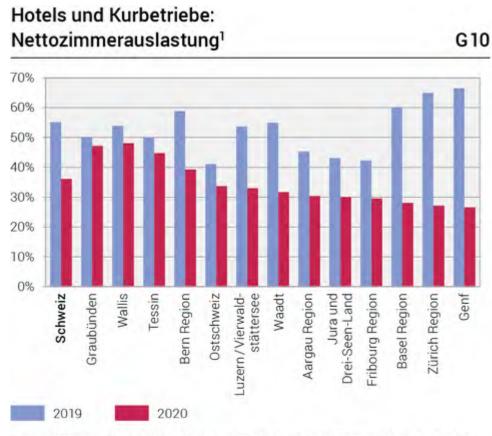
*Geographical zones defined by Switzerland Tourism

Hotels und Kurbetriebe: Logiernächte in Millionen G6





Development of net room occupancy.



¹ Anzahl Zimmernächte dividiert durch die gesamte Nettozimmerkapazität der betreffenden Periode, in Prozenten ausgedrückt

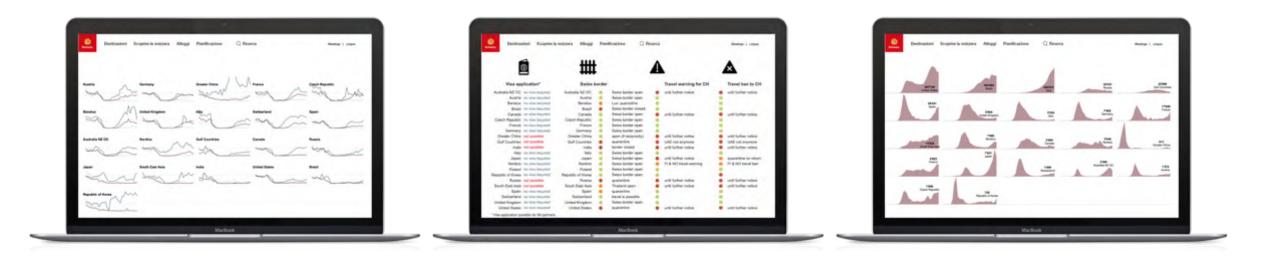
What lies ahead?

Market Indicator System.

When do the markets travel again?



Use the Market Information System (MIS).



More information under: <u>https://www.stnet.ch/indicators</u>

Dashboard.







restrictions of Switzerland

Australia NZ OC	Swiss border open
Austria 🌔	quarant. certain regions (from 01
Benelux 😑	NL: quarantine
Brazil 😑	Swiss border closed
Canada 🔴	Swiss border closed
Czech Republic 🧶	quarantine
France 🥚	quarant. certain regions (from 01
Germany 🥚	quarant. certain regions (from 28
Greater China 🧶	Swiss border open if reciprocity
Gulf Countries	Swiss border closed
India 🔴	Swiss border closed
Italy 🧧	quarant. certain regions
Japan 🥚	Swiss border closed
Nordics 😑	SWE: quarant.
Poland 🧕	Swiss border open
Republic of Korea 🛛 🌖	Swiss border open
Russia 🔴	Swiss border closed
South East Asia 🛛 🔴	only Singapore allowed to enter
Spain 🥚	quarantine (from 01.02)
Switzerland 🧶	travel is possible
United Kingdom 🥚	Swiss border closed
United States 😑	quarantine

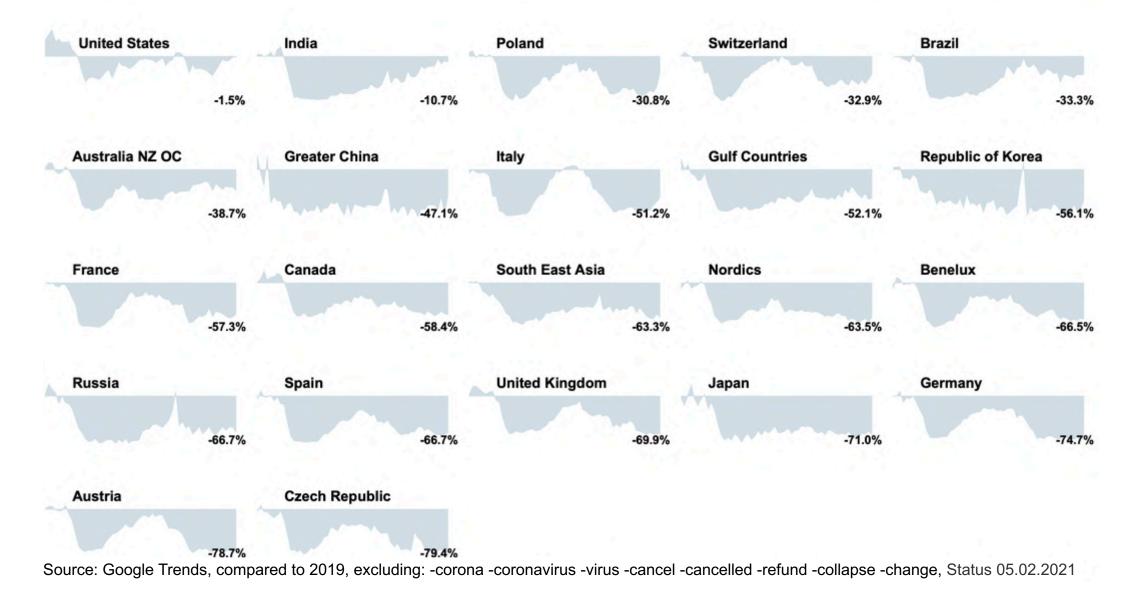


* Visa application possible for life partners.

Stand/état au: 15.02.21

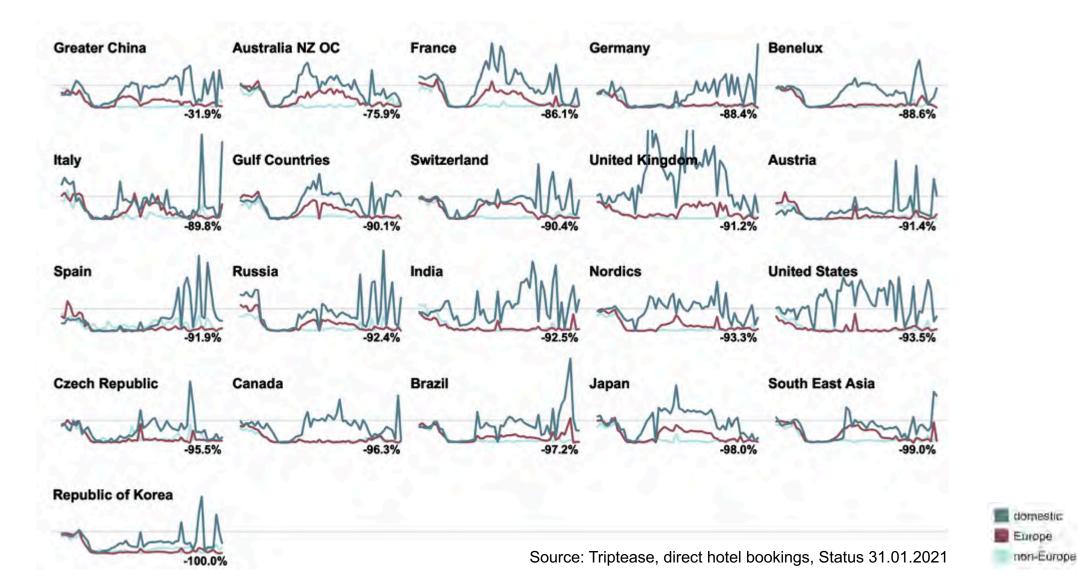


Search for Hotels.



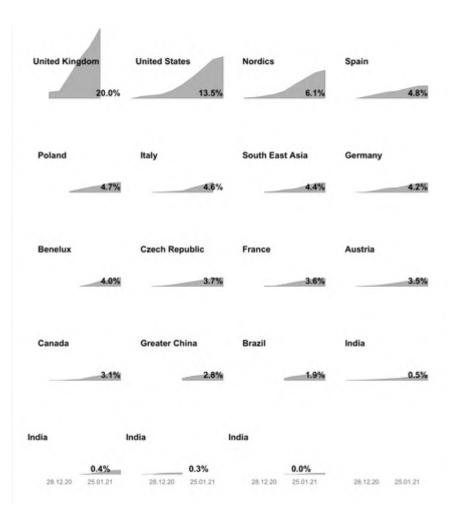


Bookings to Europe.





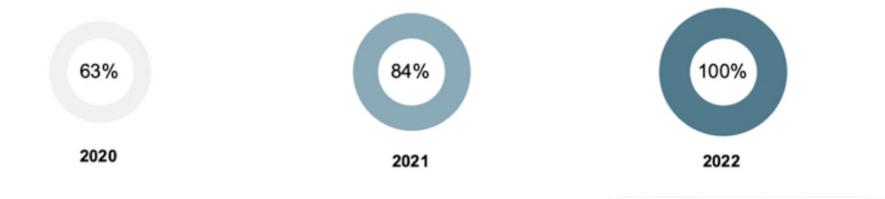
Vaccination doses adminstered per population %



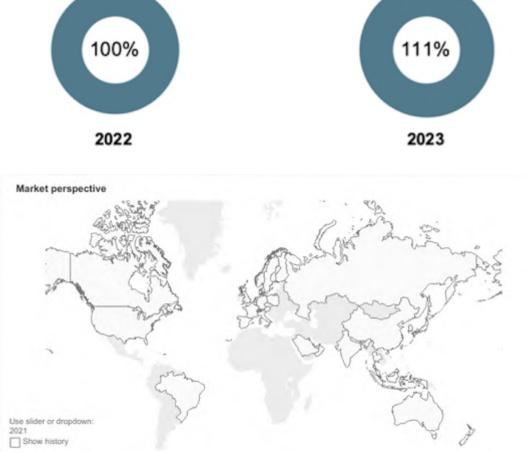
- Vaccination is an important factor for the recovery time of each market
- Travel restrictions for nonvaccinated could apply in future



Recovery travel intensity.



Quelle / Source: Estimation Switzerland Tourism, 16.02.2021





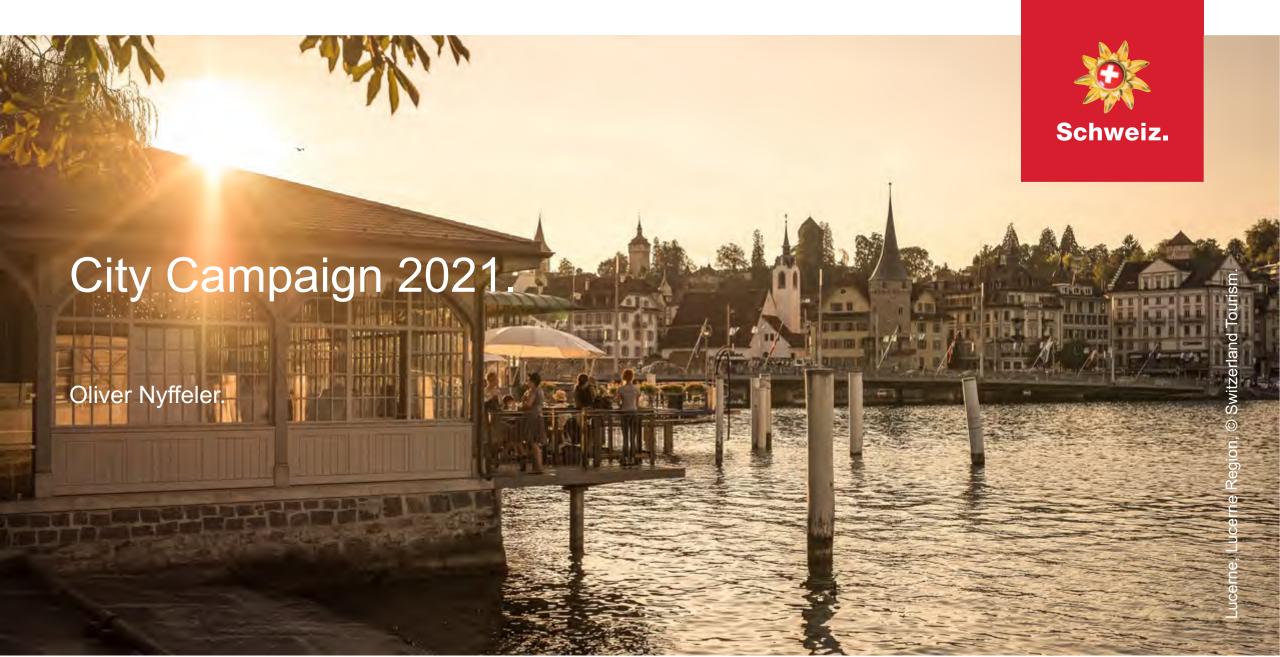
Bund / Confédération 2021: Mittel / fonds ST: Übertrag von / report 2020:

13.5 Mio.2.5 Mio.1.9 Mio.

Recovery Budget 2021:

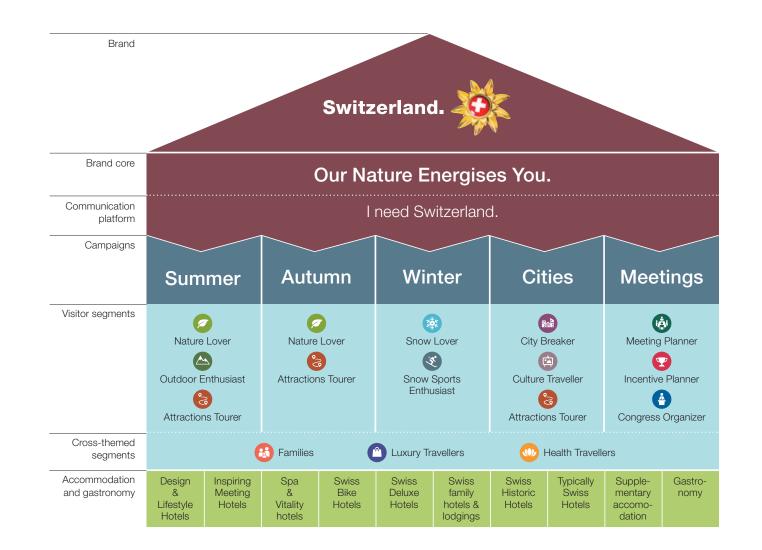
17.9 Mio.

Stand / état au 15.2.21





Campaign overview.



A quick look back...



City Swap – Coop Zeitung.

Marketing activity

We inspire and motivate the Swiss population to visit a City in another language area for 48 hours (City Swap) - with a 12 pages special in the Coop newspaper.

Date / duration

Release date: Tuesday, 4th August 2020. Bookable until end of year.

Goals / KPIs

2.7 Mio copies, up to 3.4 Mio readers.



Cette année, les Sulssesses et les Suisses partent à la découverte de leur pays. Les séjours urbains les conduisent à Saint-Gall plutôt qu'à Saint-Domingue, à Winterthour plutôt qu'à Winnipeg et à Lausanne plutôt qu'à Los Angeles.



Coire

La ville la plus ancienne de Sunse va rous mechanter, avec

pes montagnes en tolle de fond, ses ruelles tortileunes at ses

monuments historiques. Ses beutiques, restaurants, hars,

massies et galeries condérent à son vieux centre interfit aux

soitsavel un petit air méridional. Et de Coire, vous asires des

Essetronomia Découvre Coire à veto avec des hafte

Waite Sevendre aus spectaculative gorges du Rhin wi

Culture Visiber la munite d'art des Grisona Obundres

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targent development open die fairstepoer Duelle waar

Reservations as 0400 100 200 out sur; cooperation.ch/vit

ovantes De Coire, grimper au Brambrüesch, la mon-

minus a four moment pour Davos, Saint-Moritz ou Arons.

prove sime employed and point at time descent.

Promine the fait challinguase

architectes Barruzi et Veiga

d'un peintre, à proximité de la ville.

Aner les transports publies, vois deambulez dans voyagez confortablement lout en respec votre ville favo- tant l'environnement. Vous possent pro rite, rous pouver. filer de pris goantageux avec les billets admirer les vi- dégriffés. Et grâce aux offres combinée Raildieg, your birteficien survi d'offres attrayations pour its iolairs et les ve de la nature qui Pen- cances. Dans certains hôtels, vous pour toure. Yous vote sur- recentere opter pour follow - Special to

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OFFRES SPECIALES



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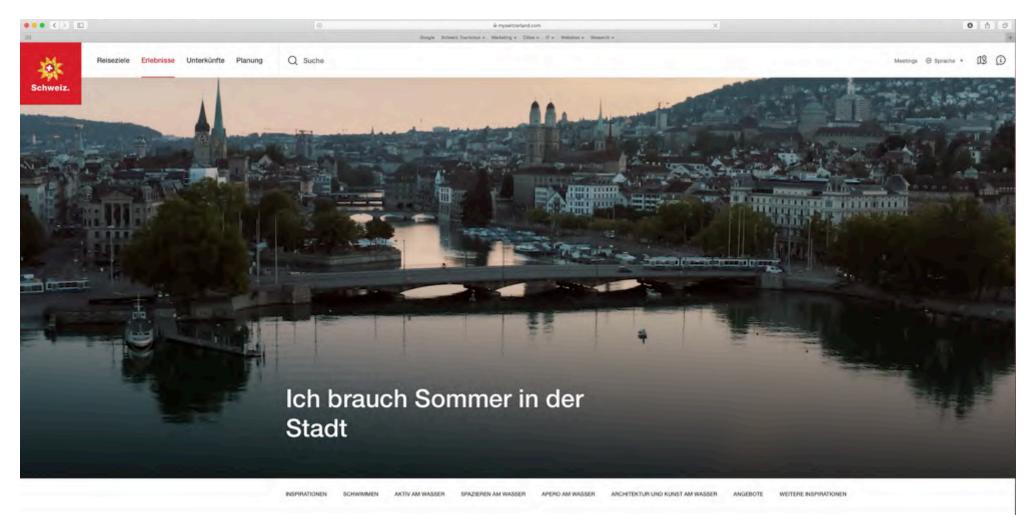
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Summer in the City Landingpage.





Der Sommer in den Schweizer Städten verspricht

Performance Push.



Four-page Magazine-inlay containing specific offers for every City, bookable throughout STC. As well as a push online and on social media within the Cities campaign.

Date / duration

Launch / Online: October 2020. Distribution print: 300'000 (D&F).





kurztrip für GH

ab 2 Nächten pro P<u>erson.</u> ...and one ahead.

2021 IS THE YEAR OF THE CITIES.

Never before did so many city partners sign up for the ST Cities campaign as for the current year. Switzerland Tourism will put more resources and budget into the Cities marketing activities in 2021 than ever before. Thanks to bundled and centralised marketing activities, the cities will receive the necessary attention. And ST will generate overnight stays through attractive products and offers.

Cities Partner 2021.



A-Partner

- Basel, Bern, Genf, Lausanne, Lugano, Luzern, St. Gallen, Winterthur, Zürich
- B-Partner
 - Baden, Bellinzona, Biel, Chur, Fribourg, Thun, La Chaux-de-Fonds, Locarno, Montreux, Neuchâtel, Olten, Rheinfelden, Schaffhausen, Solothurn, Zug
- Further Partner
 - Art Museums of Switzerland, Swiss Top Events

Marketing Activities – 3 Peaks.



The city marketing activities 2021 will be bundled and smartly distributed over the whole year. In addition to permanent "basic noise", the city activities are concentrated on three main peaks.



Spring

The cities conquer spring - the perfect season for a city break. With a focus on inspiration, we generate media attention and launch a content hub focussing on "I need spring. I need Switzerland".



Summer

With a "Hero Item" under the headline "Big City Life", the cities are making big noise and attracting attention in the neighbouring markets. This is complemented by content from the partner as well as the *Swisstainable* campaign.



Autumn

Art and culture in connection with the cities is the autumn focus. The marketing power of the Art Museums of Switzerland will be smartly bundled with the ST resources and together a major art and culture campaign will be created.

Basic noise: Collaborations (e.g. GuideMe, Digital Swiss 5 etc.), monthly Social Media Booster, 20min Collaboration ("Weekend Trips"), Media work and other activities.

Jan	Feb	Mar	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec

We need

city trips.

lanc.



Deep Dive: Segment City Breaker & Culture Traveller.

Oliver Weibel

Schweiz.

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Segments of Switzerland Tourism.



0	Nature Lover	traveller for pleasure, summer, focusing on peace, relaxation and nature
¥	Snow Sports Enthusiast	active traveller, winter, focusing on sports
	Outdoor Enthusiast	active traveller, summer, focusing on sports
8	Family	family traveller
*	Snow Lover	traveller for pleasure, winter, focusing on peace, relaxation and nature
3	Attractions Tourer	traveller focusing on exploring attractions in Switzerland
	Culture Traveller	cultural traveller
Ref	City Breaker	city traveller
•	Spa & Vitality Guest	wellness traveller
0	Luxury Traveller	luxury traveller

City Breaker.

How are our guests characterized?

For more info on our guests click here.

Switzerland Tourism.

ST market: All, single market: All, Segment: city breaker

6.1%

4.6%

3.7%

3.6%

3.3%

3.3%

2.2%

2.0%

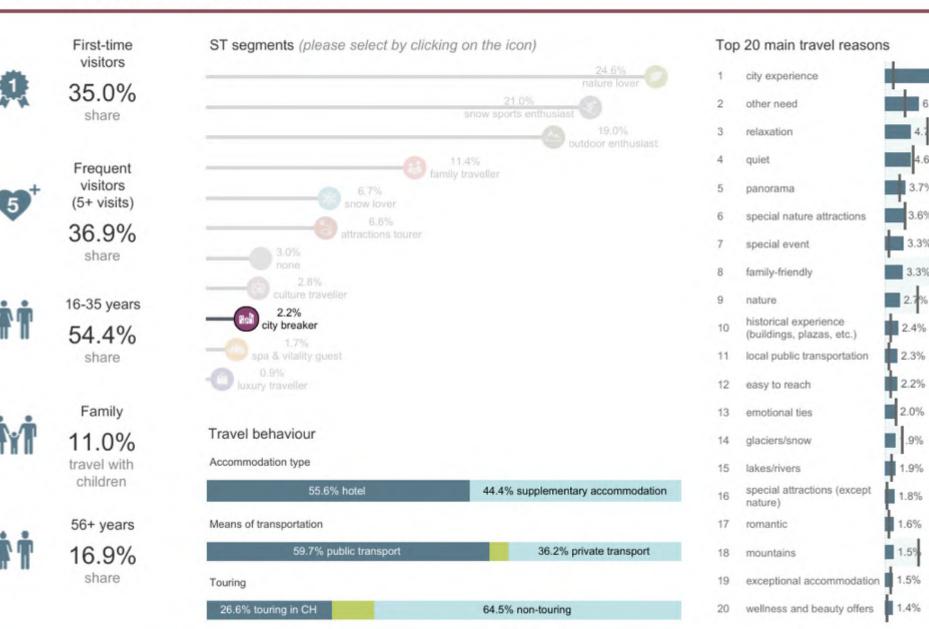
.9%

1.9%

1.8%

1.6%

1.5%

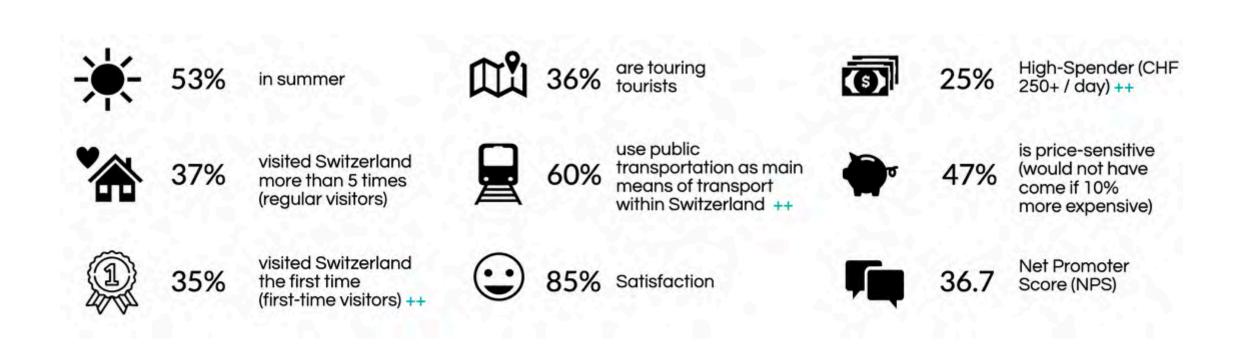


Select ST market

Switzerland	27.2%
Germany	17.4%
Other (non-ST mark	12.3%
Italy	7.1%
United Kingdom	7.0%
North America	4.8%
Benelux	4.8%
Greater China	2.5%
South East Asia	2.4%
Spain	2.2%
France	2.1%
Brazil	1.6%
Russia	1.4%
Austria	1.4%
Nordics	1.2%
Japan	1.1%
Poland	0.8%
India	0.8%
Czech Republic	0.7%
Republic of Korea	0.7%
Australia/NZ/OC	0.3%
Gulf Countries	0.3%
Or select a single mark All	ket:

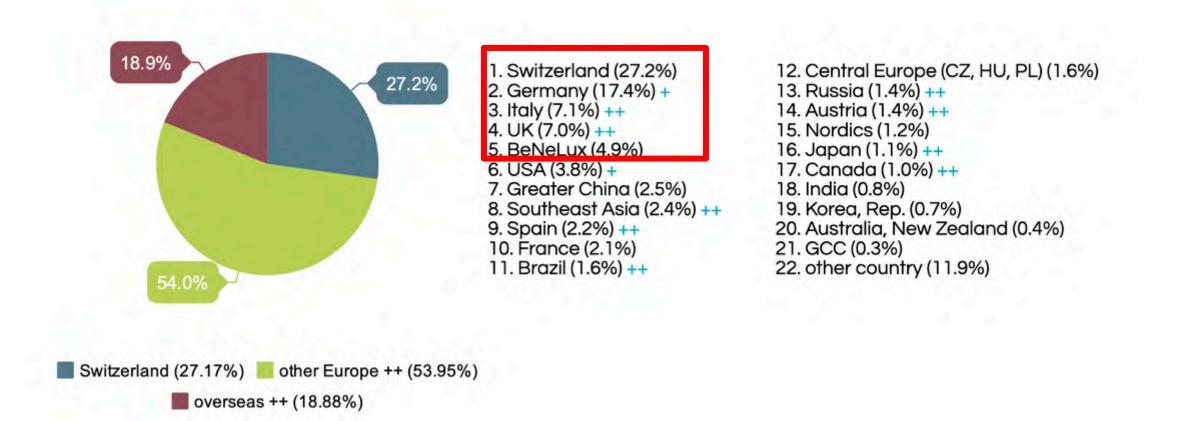
City Breaker.





City Breaker.

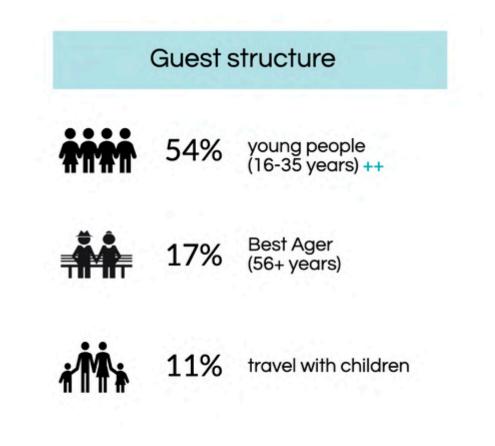




City Breaker.

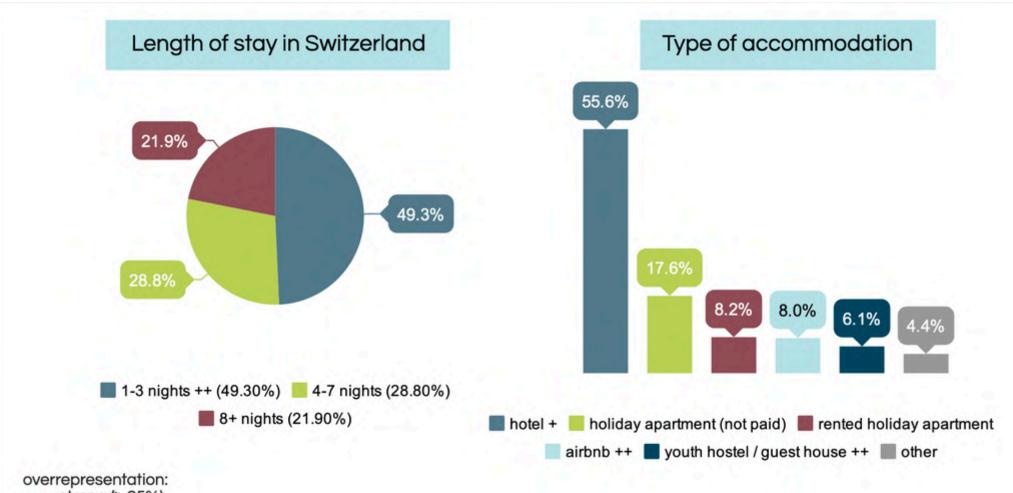






City Breaker.





City Breaker.



Main travel reasons	Sources of information	Activities
 City experience (14.7%) ++ Relaxation (4.7%) Quiet (4.6%) Panorama (3.7%) + Special nature attractions (3.6%) Special event (3.3%) ++ Family-friendly (3.3%) Nature (2.7%) Historical experience (2.4%) ++ Local public transportation (2.3%) ++ 	 Recommendation friends / family (54.4%) Rating platform/discussion forum (32.9%) ++ Social media from friends/family (25.7%) ++ Website accommodation (20.9%) Guidebooks (20.4%) + Website tour operator (18.0%) + Blogs (16.5%) ++ Website regional / local tourist org. (12.3%) Website Switzerland Tourism (12.3%) Media report about Switzerland (12.2%) 	 Shopping (37.7%) ++ Visit historical attractions (34.4%) +- Chuches & cathedrals (33.7%) ++ Regional cuisine (31.4%) Hiking (25.7%) Visit nature attractions (25.3%) Museums & exhibits (24.3%) ++ Excursions by cable car (24.1%) Boat excursions (19.5%) + Nightlife (17.0%) ++

overrepresentation: + = strong (≥25%) ++ = very strong (≥50%)

City Breaker – Top 5 Travel Reasons



Top 5 Travel Reasons for City Breaker

City Experience

Relaxation

Quiet

Panorama

Special Nature Experience





How are our guests characterized?

First-time

visitors

33.3%

share

Frequent visitors

(5+ visits)

41.2%

share

16-35 years

46.8% share

Family

10.5%

travel with

children

56+ years

27.5%

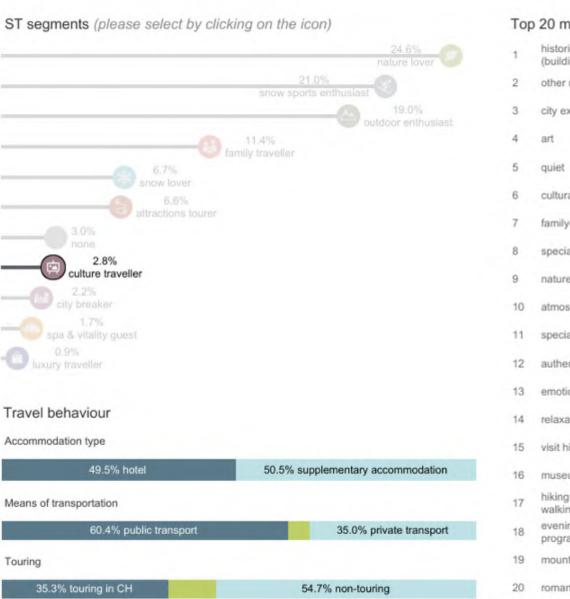
share

5

For more info on our guests click here.

Switzerland Tourism.

ST market: All, single market: All, Segment: culture traveller

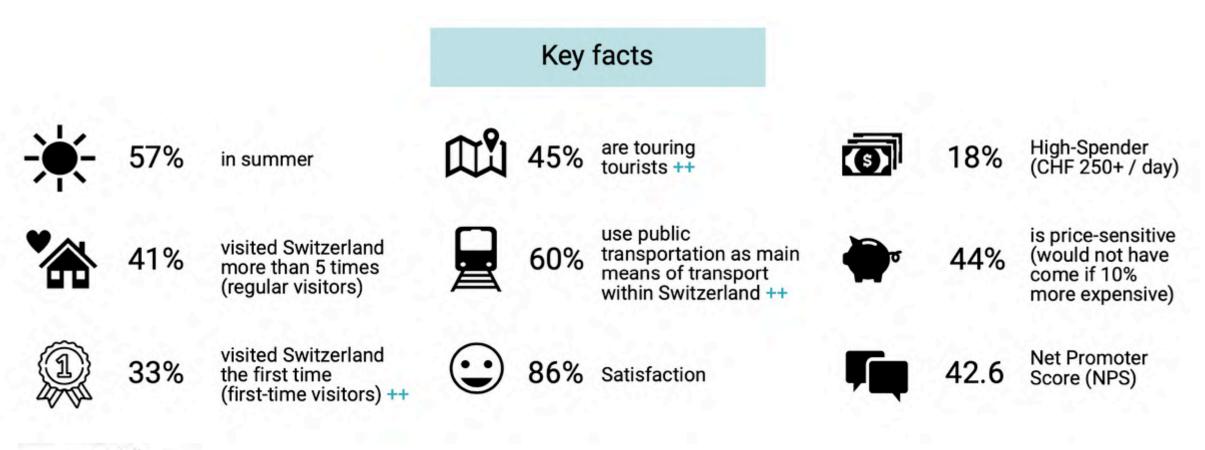


nain travel reaso	ns
rical experience lings, plazas, etc.)	7.0%
need	5.5%
experience	4.6%
	4.5%
	4.0%
ral event	3.9%
y-friendly	3.9%
al nature attractions	3.5%
e.	3.4%
sphere	3.1%
al event	2.8%
entic/original	2.5%
ional ties	2.4%
ation	2.4%
nistorical attractions	2.4%
ums and exhibits	2.2%
g (at least 2 hours ng)	2.0%
ing rammes/nightlife	2.0%
ntains	1.9%
ntic	1.7%

Select ST market

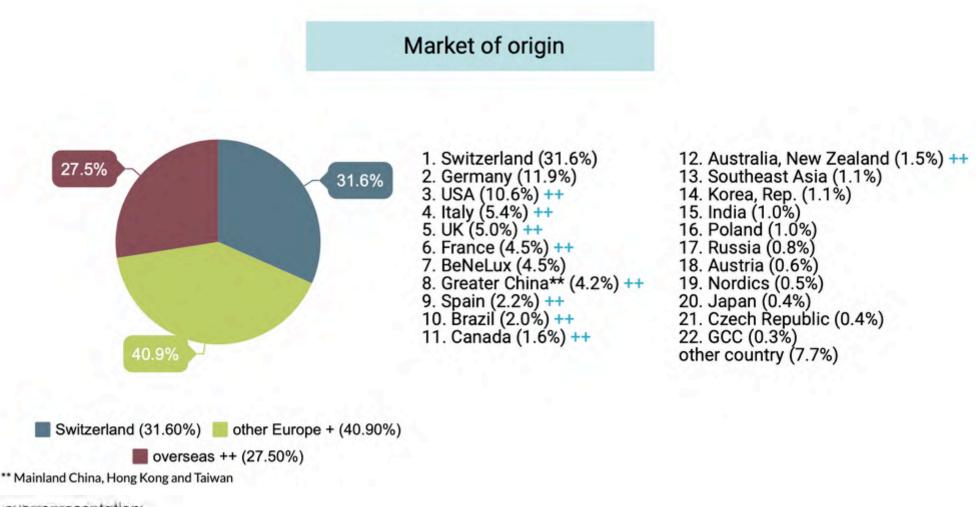
Switzerland	31.6%
North America	12.2%
Germany	11.9%
Other (non-ST mark	7.7%
Italy	5.4%
United Kingdom	5.0%
Benelux	4.5%
France	4.5%
Greater China	4.2%
Spain	2.2%
Brazil	2.0%
Australia/NZ/OC	1.5%
South East Asia	1.1%
Republic of Korea	1.1%
Poland	1.0%
India	1.0%
Russia	0.8%
Austria	0.6%
Nordics	0.5%
Czech Republic	0.4%
Japan	0.4%
Gulf Countries	0.3%
Or select a single mark All	ket:





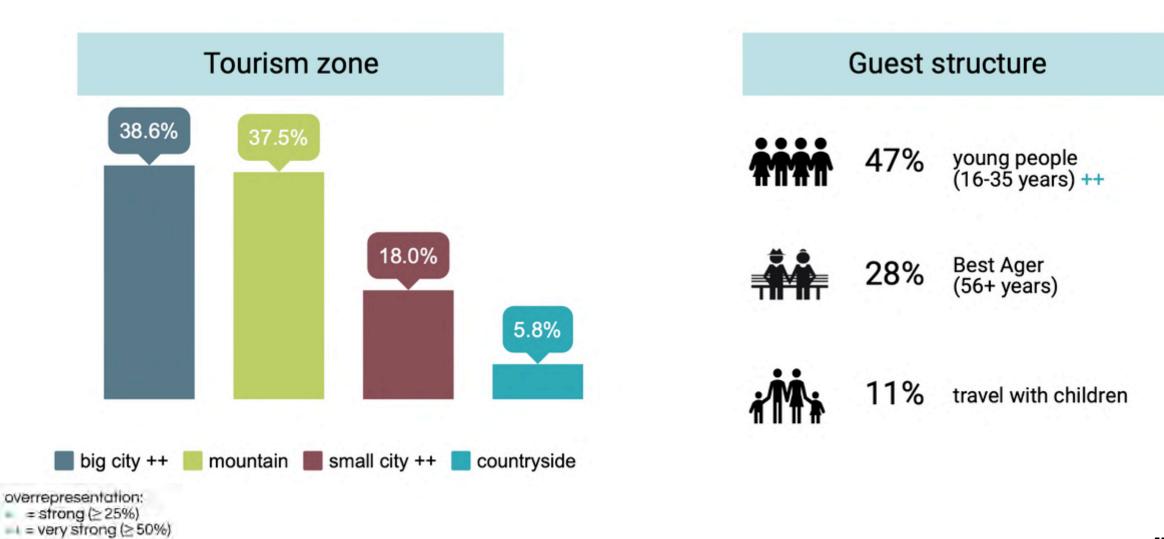
overrepresentation: = strong (≥ 25%) = every strong (≥ 50%)



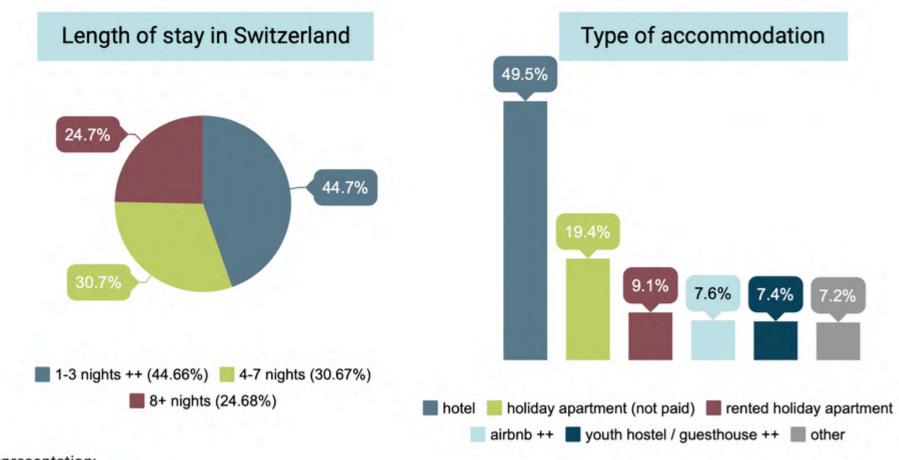


overrepresentation: = strong (> 25%) = very strong (> 50%)









overrepresentation: + = strong ($\geq 25\%$) ++ = very strong ($\geq 50\%$)



Main travel reasons	Sources of information	Activities
 Historical experience (7.0%) ++ City experience (4.6%) ++ Art (4.5%) ++ Quiet (4.0%) Cultural event (3.9%) ++ Family-friendly (3.9%) Special nature attractions (3.5%) Nature (3.4%) Atmosphere (3.1%) Special event (2.8%) 	 Recommendation friends / family (58.1%) Rating platform/discussion forum (26.9%)+ Social media from friends/family (22.0%) + Guidebooks (21.8%) ++ Website accommodation (18.5%) Website regional tourist office (14.8%) Personal information from accom. (12.9%) Website tour operator (12.8%) Blogs (12.0%) ++ Website Switzerland Tourism (11.0%) 	 Museums & exhibits (40.3%) ++ Churches & cathedrals (39.5%) ++ Visit historical attractions (39.3%) ++ Regional cuisine (34.1%) Visit nature attractions (29.6%) Hiking (29.6%) Shopping (27.2%) Excursions by cable car (25.5%) Castles & forts (23.3%) ++ Contemp. architecture (18.5%) ++



Culture Traveler - Top 5 Travel Reasons.



Top 5 Travel Reasons Culture Traveler
Historical Experience
City Experience
Art
Quiet
Cultural Event



ROIS

T



Oliver Weibel

Customer Journey.





City Campaign

Inspirational Signature Experiences

Hotel Sales / Offer Marketing

Signature Experience as a lead.



Insight:

- Hotels are not a reason for city travellers to travel (focus on city choice)
- Hotel as an oasis within the city trip
- Extraordinary experiences as a hotel USP:
 - Roof-top bars for high-flyers
 - Water experiences for sun seekers
 - Wellness area for those seeking relaxation

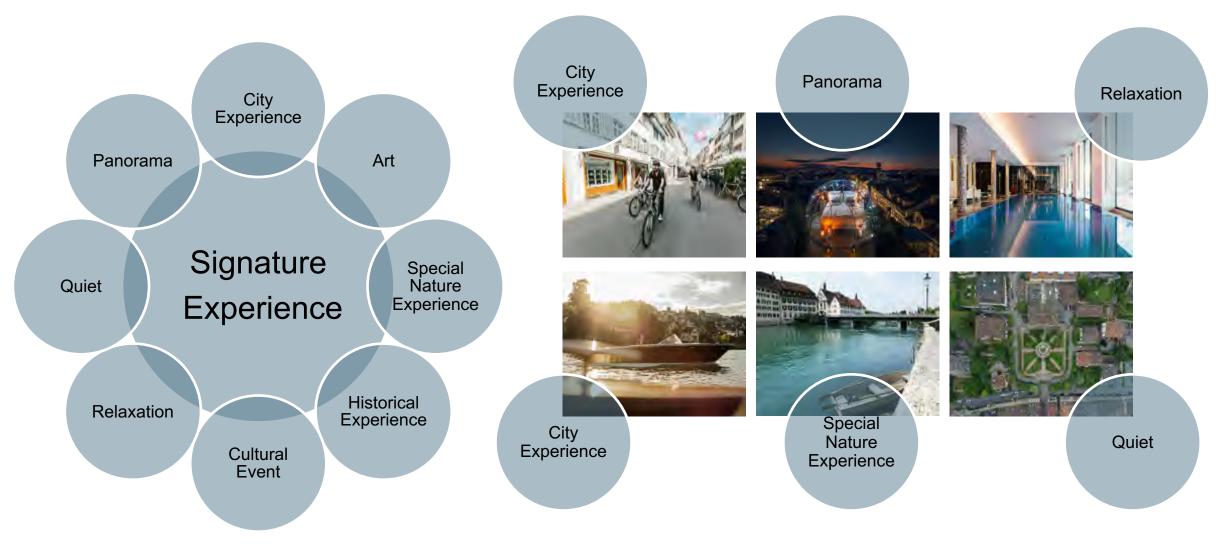
Hotel recommendations Zurich:



Signature Experiences.

Examples Signature Experience.





Examples Signature Experience.



Art

Park Hyatt Zurich

Art is omnipresent in this contemporary hotel. Original works by Sol LeWitt, Heinz Mack, Serge Poliakoff, Ossip Zadkine, Günther Uecker and many others adorn the rooms. An installation by Swiss artist Martina Vontobel entitled "Network" forms the heart of the house.

(max. 500 signs)



Der Teufelhof Basel

Examples Signature Experience.



City Experience



Jetzt die nächste Städtereise planen und inspirative Hotels entdecken. MySwitzerland.com/cities

🐴 HotellerieSuisse





Sales for Hotels (1/2).

- Offers with an attractive price and relevant added value in the form of the Signature Experience
 - City Breaker: Kitchen Safari, Cocktail Course, Exploration Tour (Bike Rental / Tour)
 - Culture Traveller: Museum entrance fee, guided tour of the architecture of the hotel

Performance Pilot with tracking of direct booking

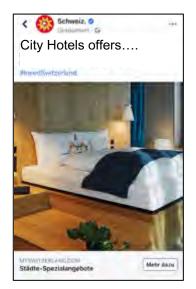
- Connection of hotel booking engines to analytics with external support
- Better tracking across the entire customer journey as well as understanding the impact of ST's offer marketing.
- Target: 50 hotels can be tracked until booking



Sales for Hotels(2/2).

- Direct bookings on your Engine
- No-Commission
- Choose your added values







<u>Zürich</u> 25Hours Hotel Langstrasse****

Zusatzleistung Schindelhauer Bike, Kinoeintritt Kosmos, Eintritt Schaudepot Museum für Gestaltung



Basel Nomad Design & Lifestyle Hotel **** Zusatzleistung

Upgrade hőhere Zimmerkategorle, Zugang zum Library Glub (Inkl. Afternoon Tea, Apéro mit Snacks und Drinks)



General Inputs & Conclusion.

Oliver Weibel



Live your concept.

Location, location, location.

The touring guest as an opportunity.

Take Home – To Do's

- Signature Experience
 - Stnet.ch/city-push

2 Offers

- City Breaker
- Culture Traveller
 - Direct Booking links on your website

12th March 2021 – hand in the information Start of campaign mid. April

For tracking – we will contact the hotels directly





Danke. Merci. Grazie. Grazia.



Schweiz.