



Suíça.



Switzerland.

#Ferientag

Schweizer Ferientag
Journée Suisse des Vacances
Giornata Svizzera delle Vacanze
Switzerland Vacation Day

2021

#Ferientag

Schweizer Ferientag
Journées Suisses des Vacances
Giornate Svizzere delle Vacanze
Nederlandse Vakantiedagen
2021



Switzerland.

Let's do this!

Presenting Partner





Suíça.

Webinar.

All you need to know about Market Brazil.

5 May 2021.

Ferientag 2021.

Fabien Clerc, Head of ST Brazil.

Facts, data & tips.

Current situation Brazil.



- 2nd Covid wave still raging although cases and deaths have been declining.
- Brazil remains on risk-list countries.
- Vaccination campaign still slow (32 mio/15%).













- ICU admission declining.
- Vaccine doses delivery for coming months is promising.
- LX increase frequency to 7x/week in July (6 in June).

CONCLUSION : The new Brazilian strain will probably hinder the quicker recovery of the market, however, thanks to a positive vaccination outlook, the number of hospitalizations, cases and deaths have been dropping.



A large population.

Rank ↕	Country (or dependent territory) ↕	Population ↕	% of world population ↕	Date ↕	Source
1	 China ^[b]	1,403,336,960	18.0%	1 Jul 2020	National population clock ^[3]
2	 India ^[c]	1,364,160,318	17.5%	1 Jul 2020	National population clock ^[4]
3	 United States ^[d]	329,957,851	4.23%	1 Jul 2020	National population clock ^[5]
4	 Indonesia	269,603,400	3.46%	1 Jul 2020	National annual projection ^[6]
5	 Pakistan ^[e]	220,892,331	2.83%	1 Jul 2020	UN Projection ^[2]
6	 Brazil	211,733,883	2.72%	1 Jul 2020	National population clock ^[7]
7	 Nigeria	206,139,587	2.64%	1 Jul 2020	UN Projection ^[2]
8	 Bangladesh	168,878,260	2.17%	1 Jul 2020	National population clock ^[8]
9	 Russia ^[f]	146,748,590	1.88%	1 Jan 2020	National estimate ^[9]
10	 Mexico	127,792,286	1.64%	1 Jul 2020	National annual projection ^[10]

A strong economy.



Suíça.

# ↓	Country	GDP (nominal, 2017)	GDP (abbrev.)	GDP growth	Population (2017)	GDP per capita	Share of World GDP
1	United States	\$19,485,394,000,000	\$19.485 trillion	2.27%	325,084,756	\$59,939	24.08%
2	China	\$12,237,700,479,375	\$12.238 trillion	6.90%	1,421,021,791	\$8,612	15.12%
3	Japan	\$4,872,415,104,315	\$4.872 trillion	1.71%	127,502,725	\$38,214	6.02%
4	Germany	\$3,693,204,332,230	\$3.693 trillion	2.22%	82,658,409	\$44,680	4.56%
5	India	\$2,650,725,335,364	\$2.651 trillion	6.68%	1,338,676,785	\$1,980	3.28%
6	United Kingdom	\$2,637,866,340,434	\$2.638 trillion	1.79%	66,727,461	\$39,532	3.26%
7	France	\$2,582,501,307,216	\$2.583 trillion	1.82%	64,842,509	\$39,827	3.19%
8	Brazil	\$2,053,594,877,013	\$2.054 trillion	0.98%	207,833,823	\$9,881	2.54%
9	Italy	\$1,943,835,376,342	\$1.944 trillion	1.50%	60,673,701	\$32,038	2.40%
10	Canada	\$1,647,120,175,449	\$1.647 trillion	3.05%	36,732,095	\$44,841	2.04%

Swissness in Brazil.



- Very strong & positive brand (350 Swiss companies in Brazil)
- Top quality: Return / investment
- Status
- “Luxury”

Challenges:

- Expensive, not fun, proper but rigid, “cold”, Swiss timing

Opportunity post-pandemic:

- “Clean & safe” and “close to nature hideaway” becomes main travel reasons.

Brazilian business culture.

Adapt your product to the local culture.

- Content
- Communication
- Language

Adapt personally to the local business culture.

- Spontaneous <-> Perfectionists
- Focus on person <-> Individualistic
- Need a lot of patience <-> Efficiency
- High flexibility, spontaneity <-> “Swiss Timing”





Suíça.

THINK BIG.

Be loud – creative – courageous – in love with Brazil.



Market Insights.

Brazil.



Switzerland.

Overnights (hotels)

0.25 M
million

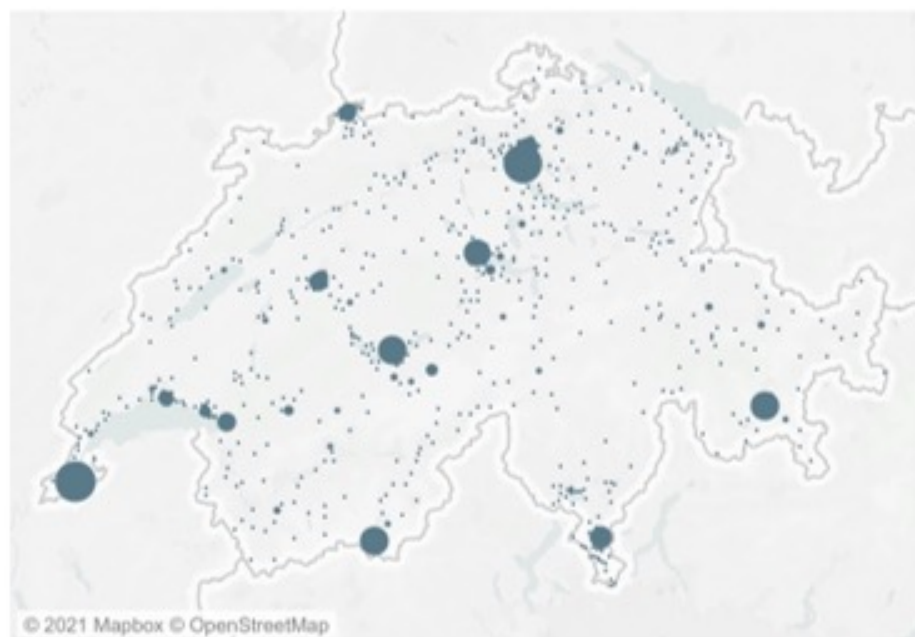
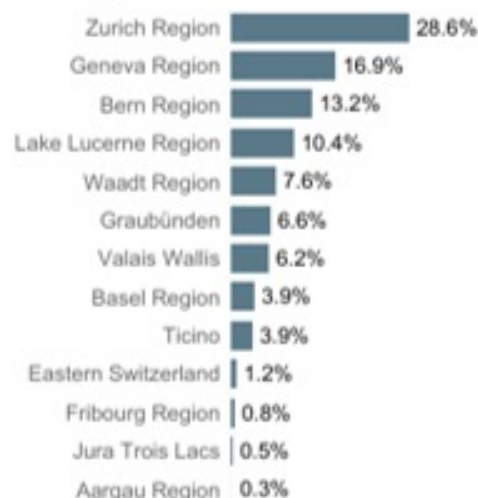
Length of stay

2.3
nights

Market share

0.6%
market share

Tourism regions (please select for filtering)



Select year
2019

Market share
(select ST market)

1	Switzerland	45.3%
2	Germany	9.9%
3	North America	7.0%
4	Greater China	4.7%
5	United Kingdom	4.1%
6	Benelux	3.5%
7	France	3.2%
8	Italy	2.2%
9	Gulf Countries	2.2%
10	India	2.0%
11	South East Asia	1.5%
12	Nordics	1.2%
13	Spain	1.2%
14	Republic of Korea	1.1%
15	Australia New Ze..	1.0%
16	Japan	1.0%
17	Austria	1.0%
18	Russia	0.9%
19	Brazil	0.6%
20	Poland	0.5%
21	Czech Republic	0.3%
22	Other (non-ST m..	5.6%

Region of origin*



Tourism zones (please select for filtering)



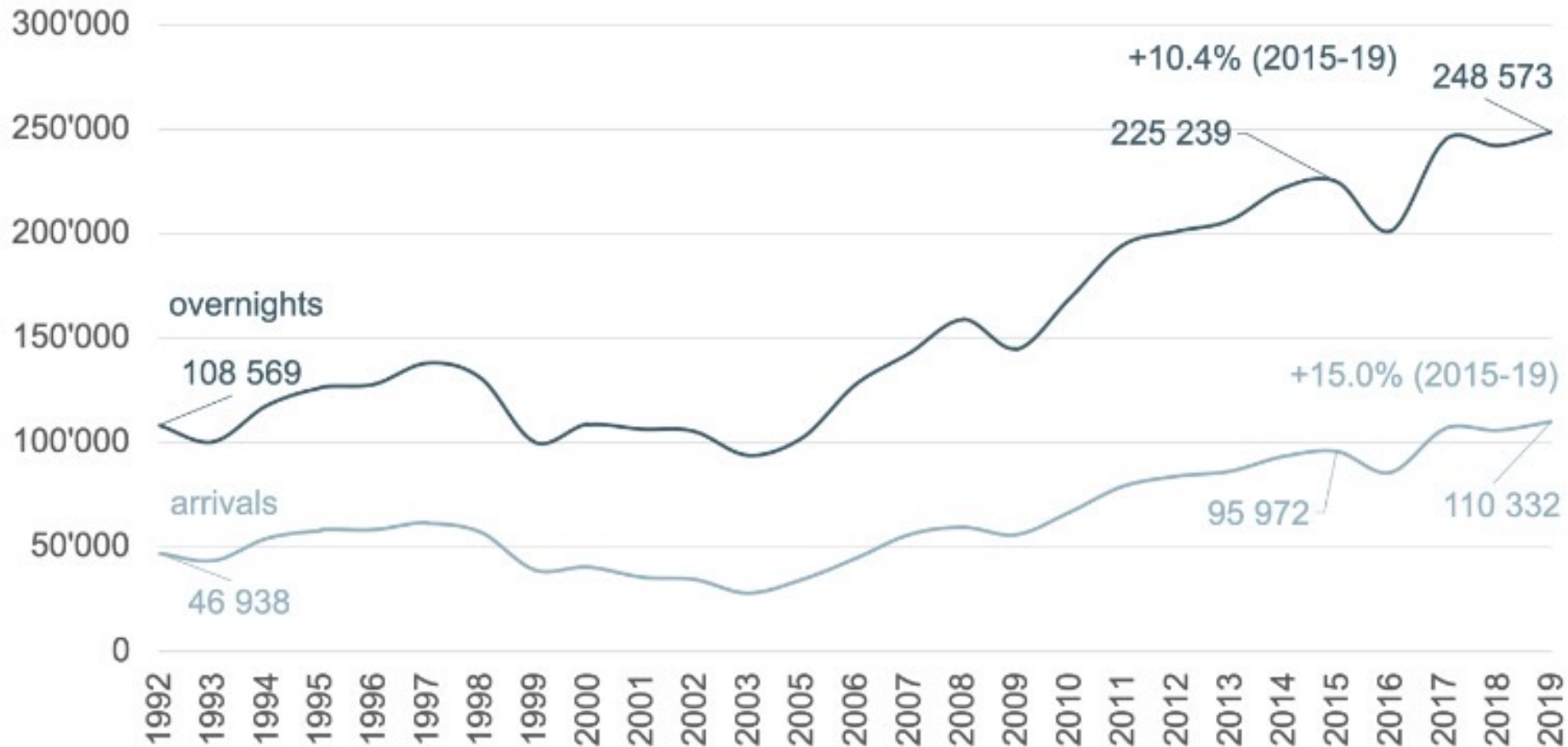
Top 10 destinations



Or select a single market:
All

Brazil on the rise.

Overnight development between 1992 and 2019.

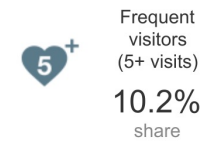
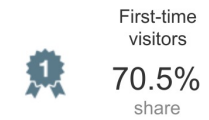


Brazil – Guest profile.

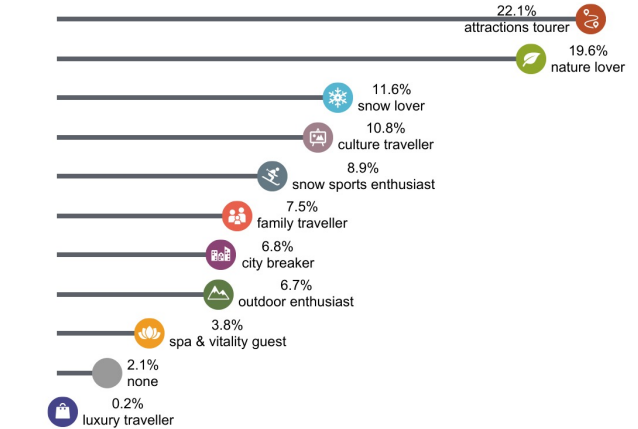


How are our guests characterized?

Market: Brazil, Segment: All



ST segments (please select by clicking on the icon)



Travel behaviour





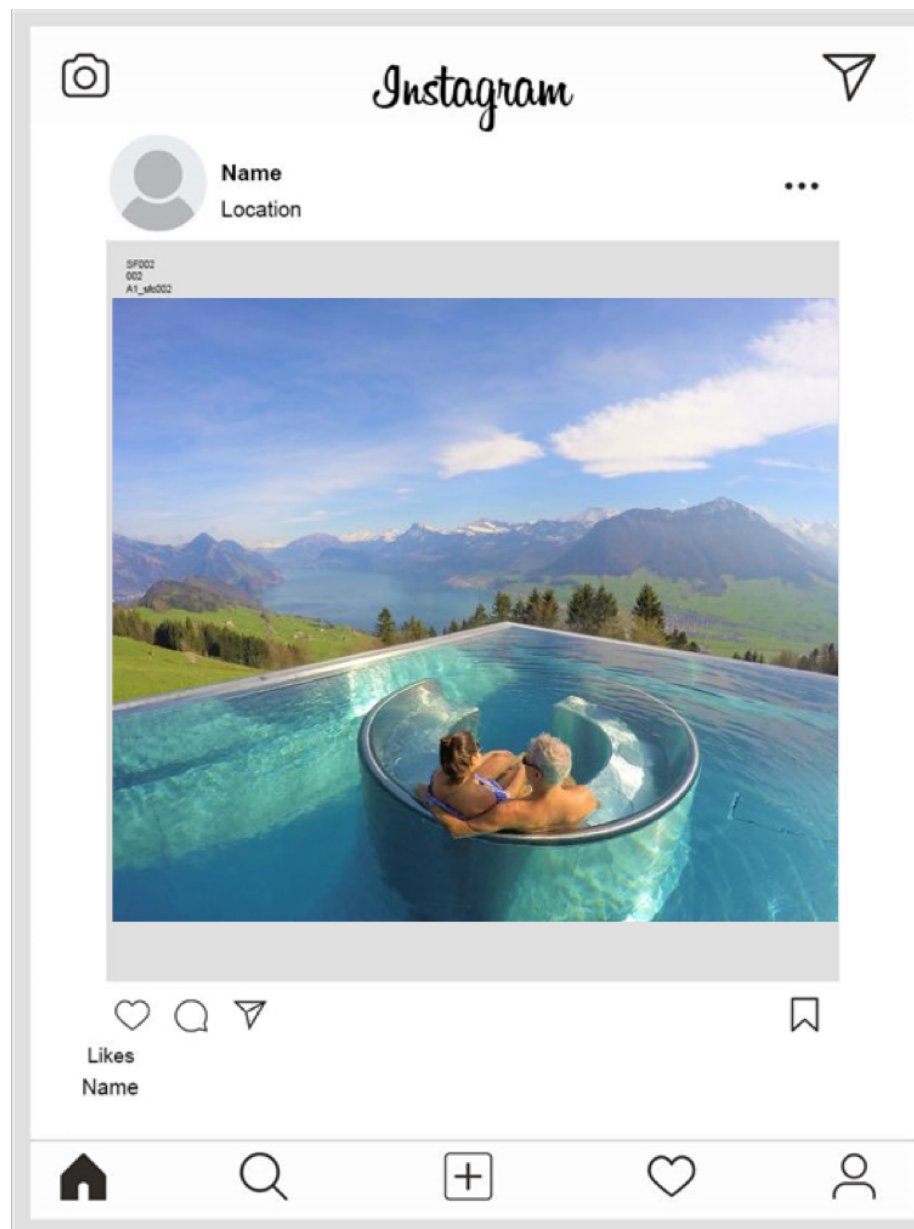
Suíça.

Why CH?

Rest & relaxation

Culture

Gastronomy



Public transport

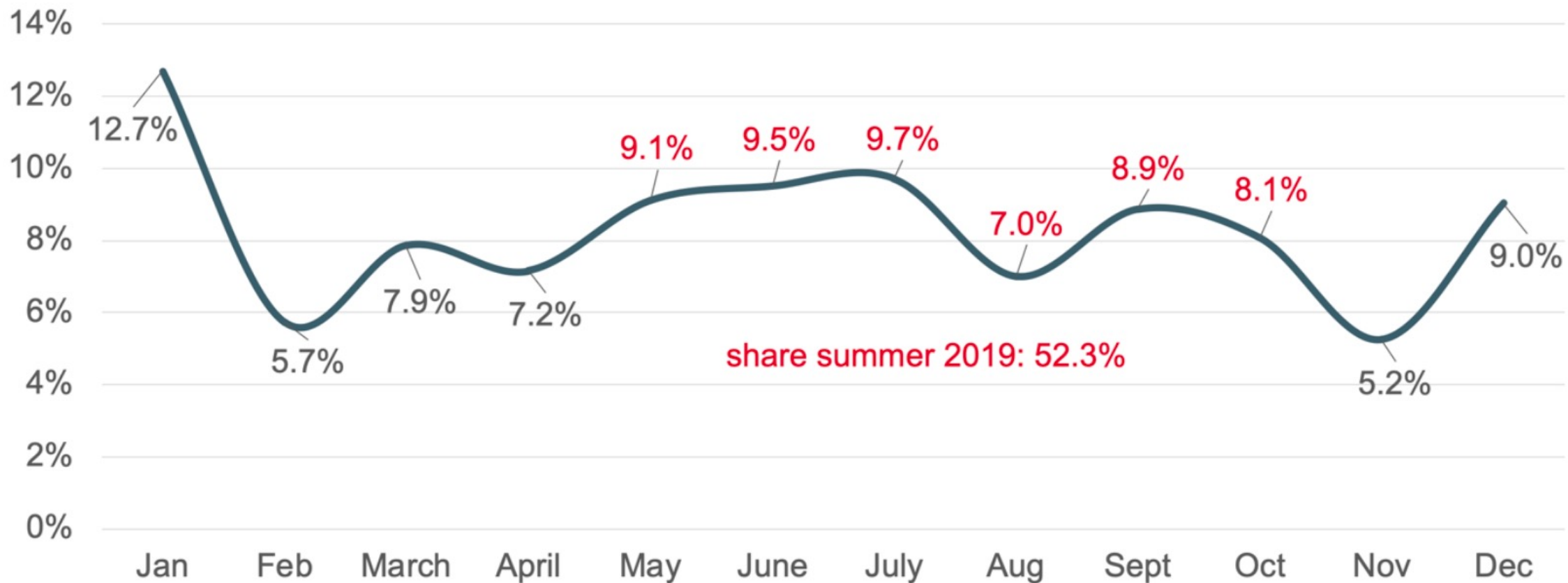
Water/mountain

Beautiful scenery



Suíça.

Seasonality – paradigm shift.



source: FSO

Customer Journey: Campaign Logic.

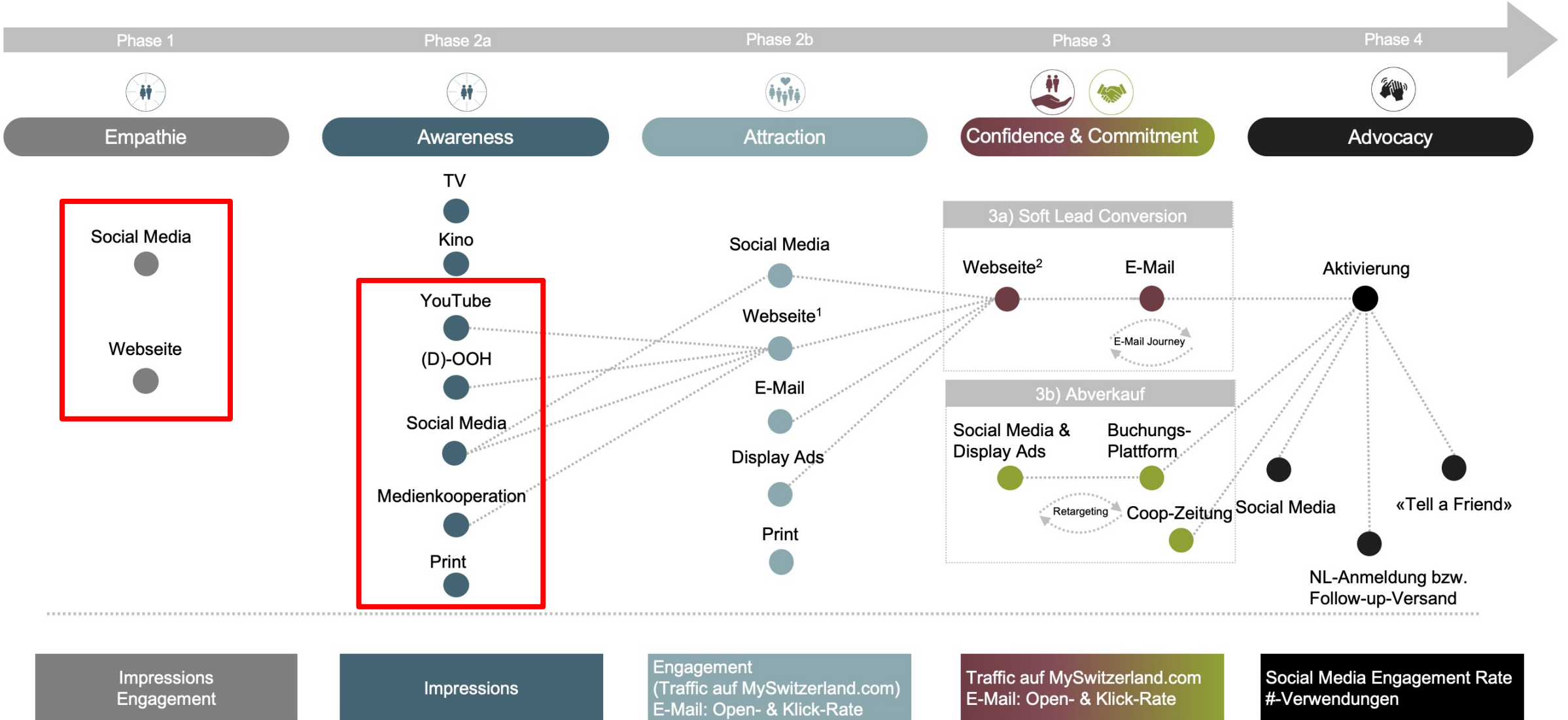


Switzerland.

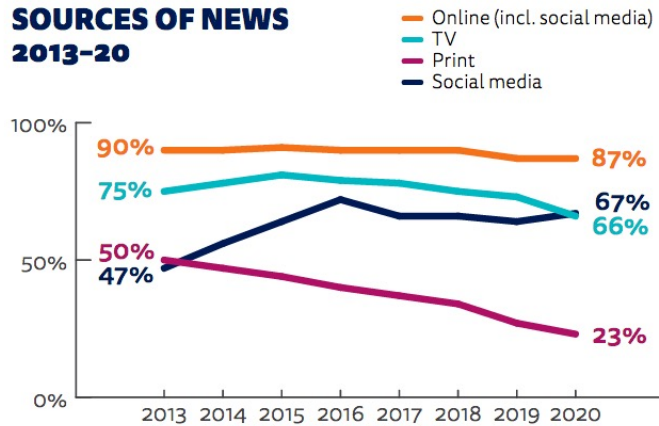
Phasen

User Journey Flow (exemplarisch)

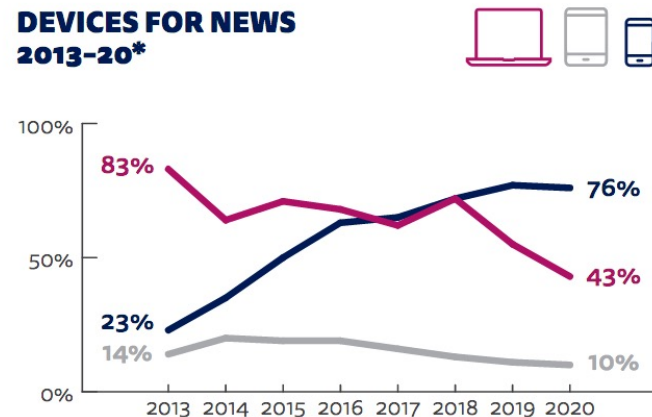
KPIs



Changing media landscape.



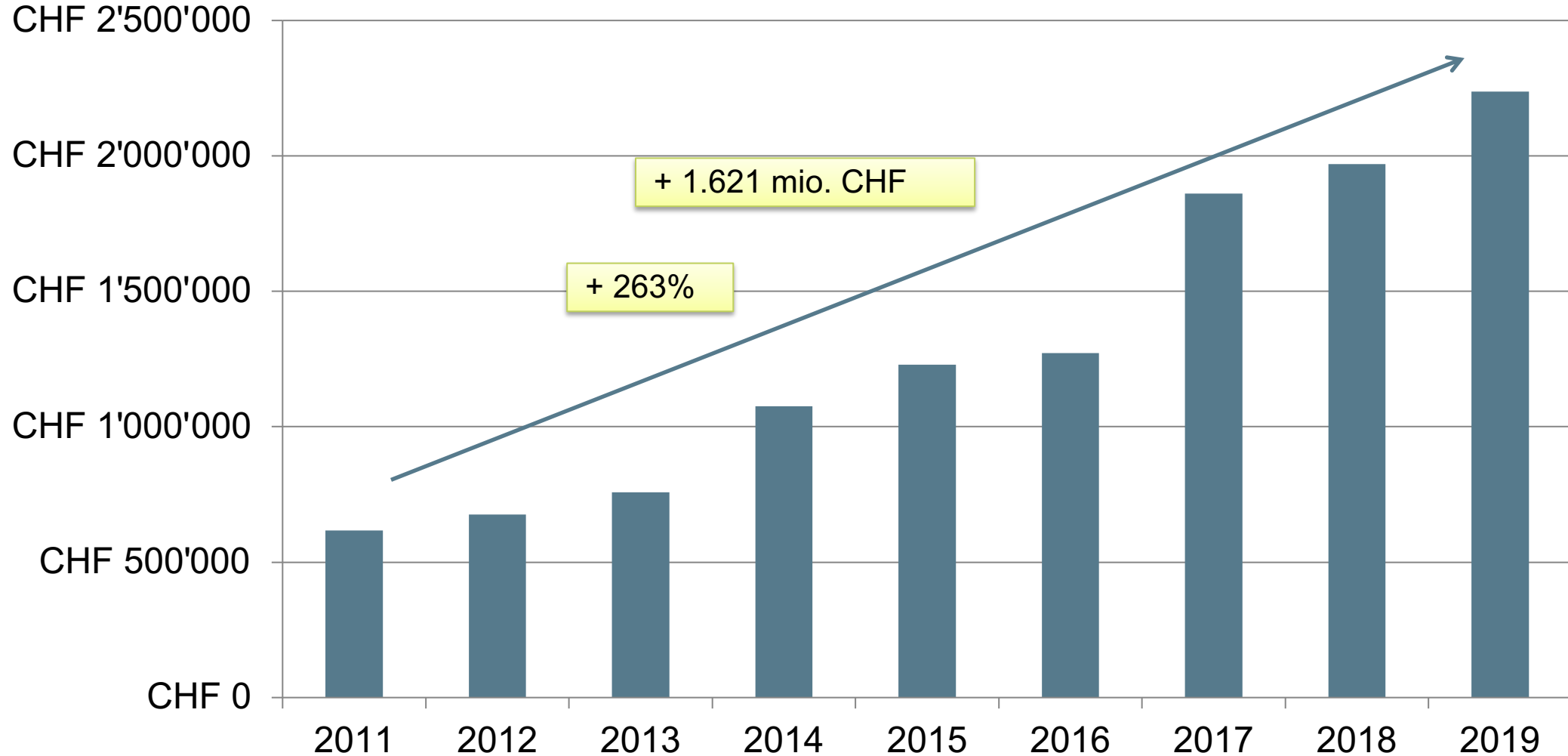
- For the first time, social media overtook television in terms of media consumption for news.



- Smartphone use for news is stable, while the use of computers declined.
- Print readership has halved since 2013 and the COVID crisis is likely to hit the sector hard.

*2018 figures for computer use were likely overstated due to an error in polling.

Swiss Travel System sales (turnover CHF).



Swiss Travel Pass.



- Brazilians travel with a lot of luggage / Express door to door luggage service can solve this.
- Traditionally a rental car market.
- But growing market for STP.
- Train experience “unique”.
- Panoramic trains.

SWISS stopover program.



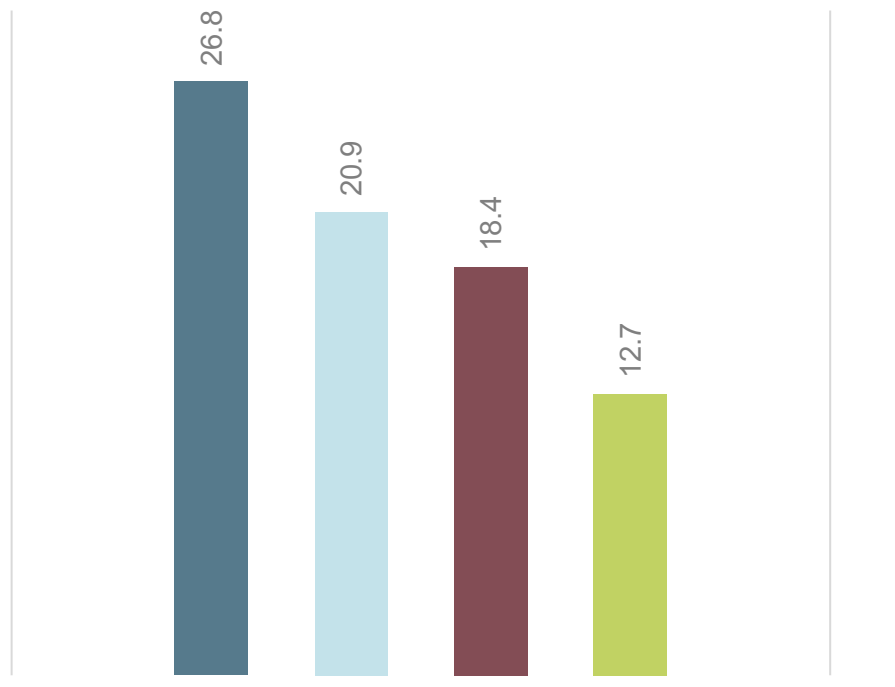
- Market n1. for stopover program.
- Brazilians love “added values”.
- High ranking of Zurich Airport and SWISS.
- 62.8% BR travellers combine Switzerland with other countries in Europe or Asia – big potential.

Trade and media landscape.

Key of success: mix of media & trade.

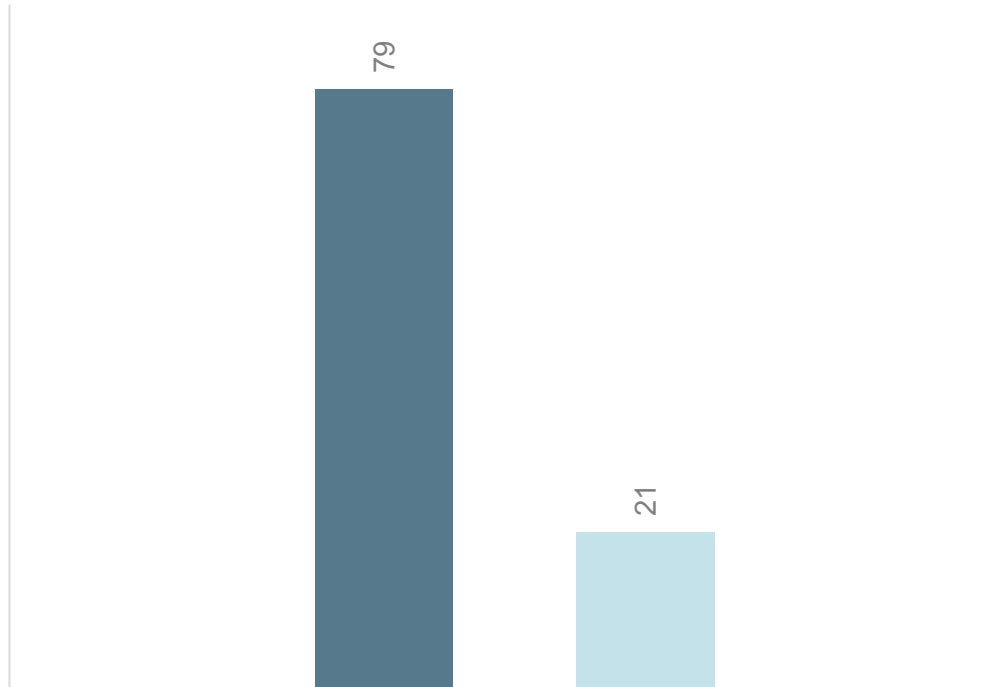
Influence a trip (%)

■ Social media ■ Travel sites
■ Friends & family ■ Travel agency



Comercialize a trip (%)

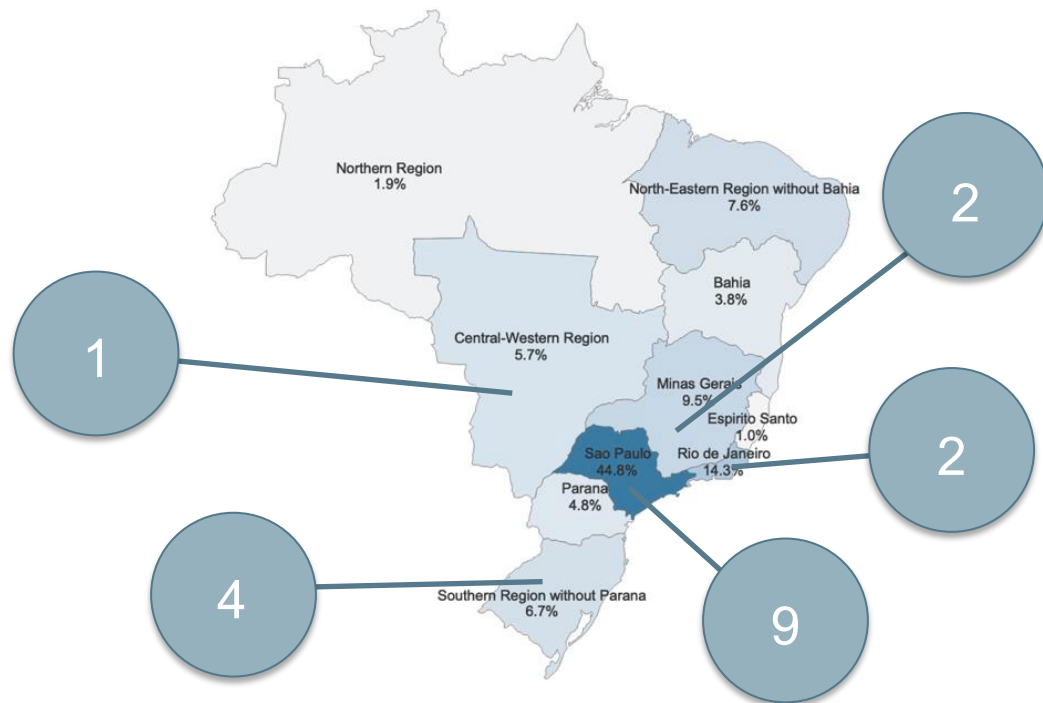
■ Travel agency ■ Others





Suíça.

The travel trade in Brazil.



Consortias/Associations



Traveller Made®



Prospect/watch list



Luxury



TTWGroup
TRAVEL THE WORLD



PRIMETOURL



CHRIS BIAGIONI
VIAGENS ESPECIAIS



MERCATUR PREMIUM



Kangaroo Tours

Generalist



BLANCTOUR
operadora





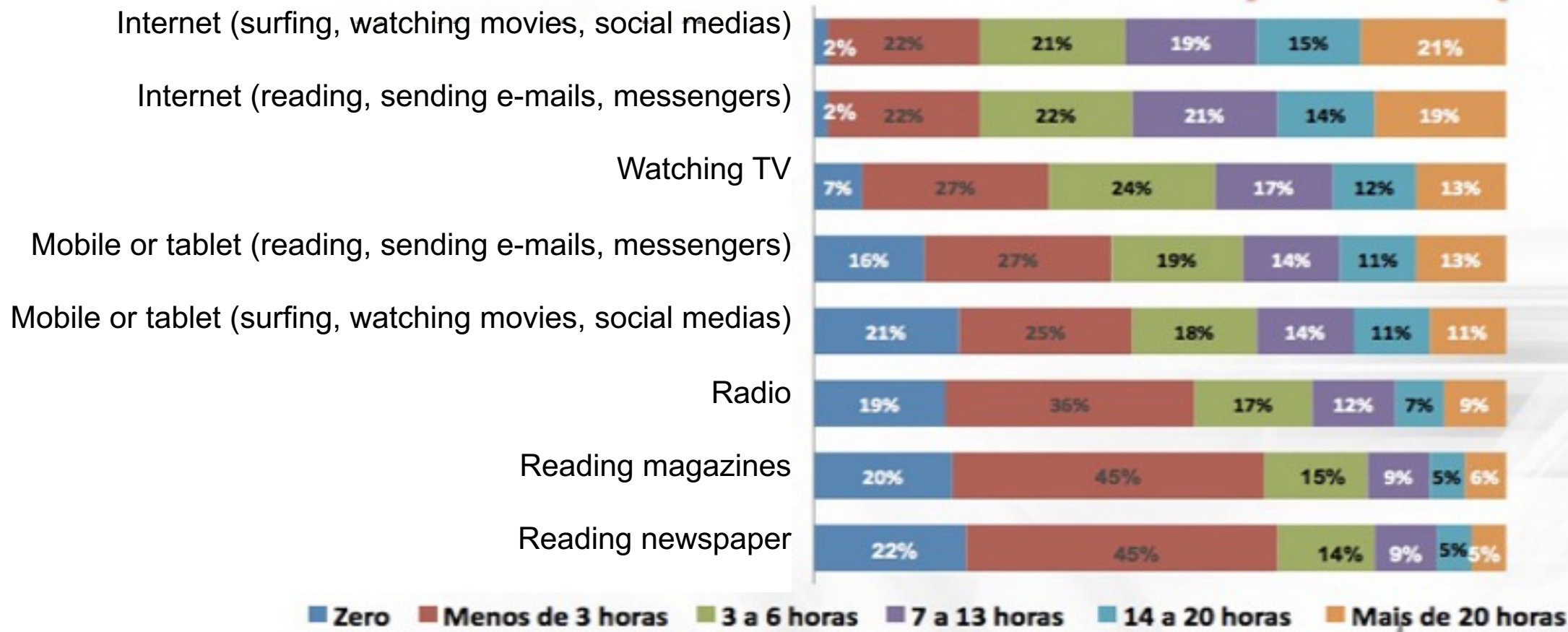
Suíça.

Media consumption.

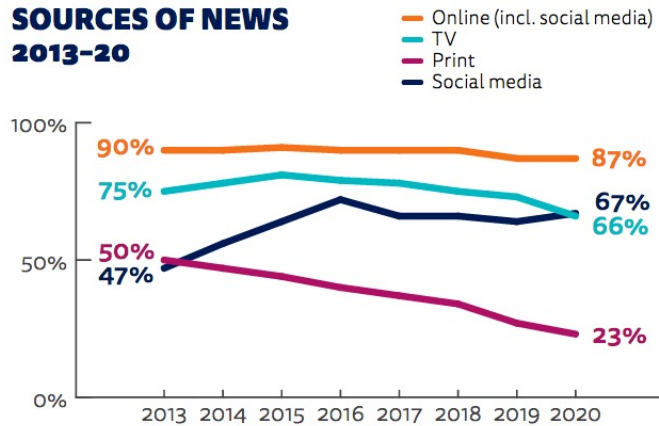
Weekly media consumption.

Internet is the most consumed media

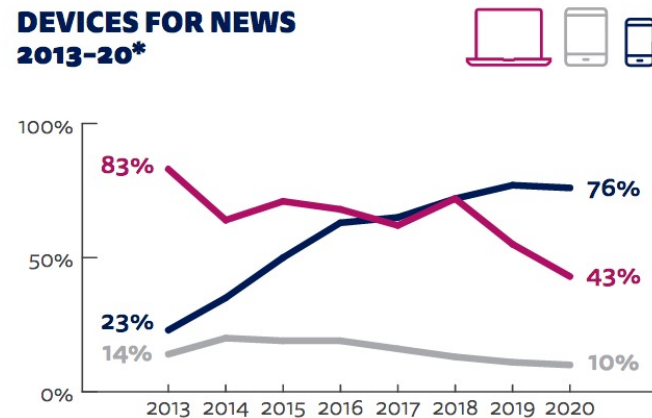
36% +2h



Changing media landscape.



- For the first time, social media overtook television in terms of media consumption for news.



- Smartphone news use is stable, while the use of computers declined.
- Print readership has halved since 2013 and the COVID-crisis is likely to hit the sector hard.

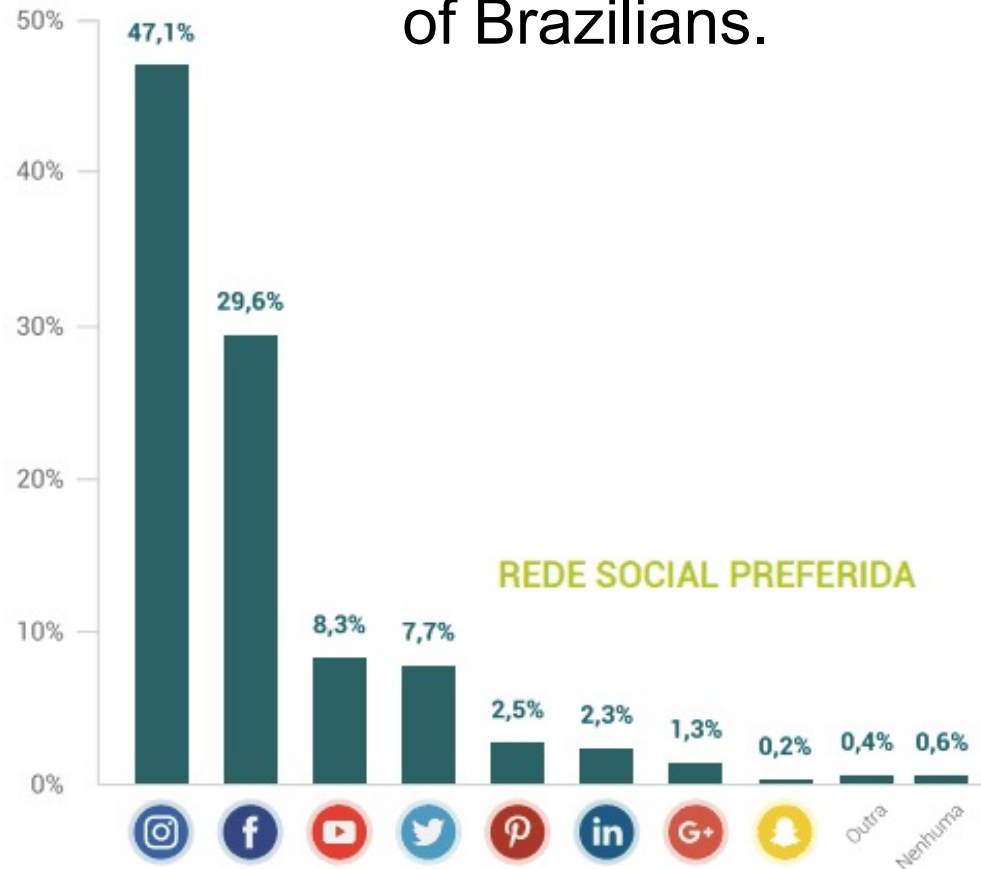
*2018 figures for computer use were likely overstated due to an error in polling.

Power of social media.



Instagram is king.

- Preferred social media for 47% of Brazilians.



ST BR SoMe accounts.

- B2C strategy

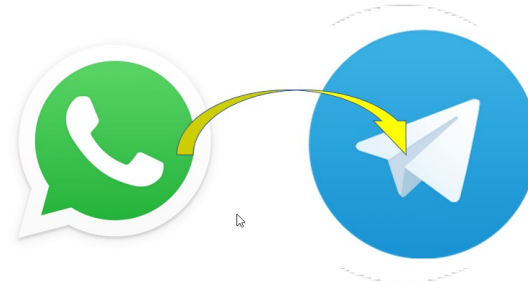


19'000



159'300

- B2B strategy



378



753

Instagram – B2C strategy.



- ST BR Instagram: launched in January 2020.
- Stories: market specific content, reposts of influencer trips, events.
- Opportunities during COVID-19 crisis in Brazil:
 - Keep communication & desire of Switzerland high
 - Live talks
 - DreamNowTravelLater campaign
 - GIF stickers Clean and Safe, InS filter.

Instagram activities during lockdown: DNTL.



Instagram activities during lockdown: "Lives".



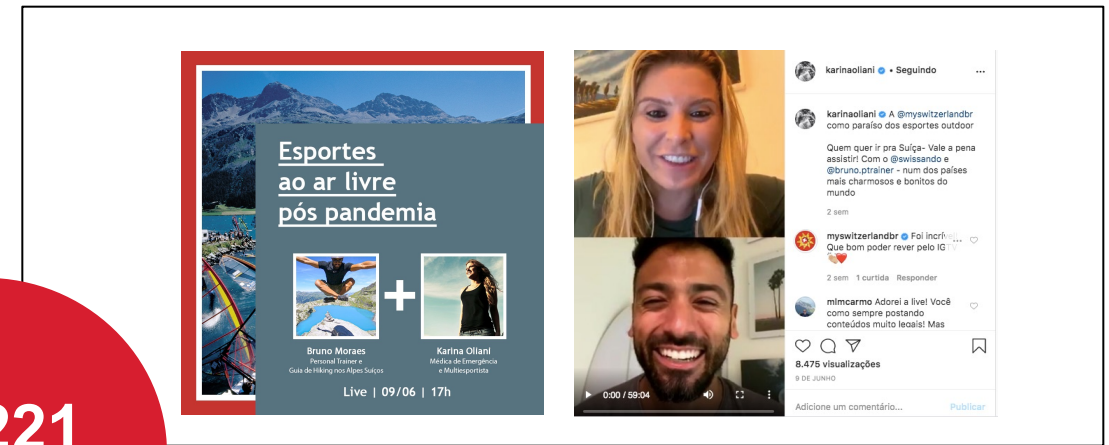
Acompanhe minha conversa Live com Christina Gläser, dia 11/06 (quinta-feira) às 17h.

"Novo Turismo: a reabertura da Suíça pós pandemia"
 Christina Gläser
Cônsul da Suíça / Diretora Switzerland Tourism Brasil

silviabraz • Seguindo
 Novo Turismo
 Um papo com @christina.glaeser, cônsul da Suíça no Brasil, sobre a retomada e novas tendências no turismo suíço @myswitzerlandbr

clercfabien Bravo! 3 curtidas Responder
 mei.cantinho Silvia amei a live. Quem sabe um dia vou a Suíça! Rrs muito medo de avião! 8 curtidas Responder

38.401 visualizações
 11 DE JUNHO



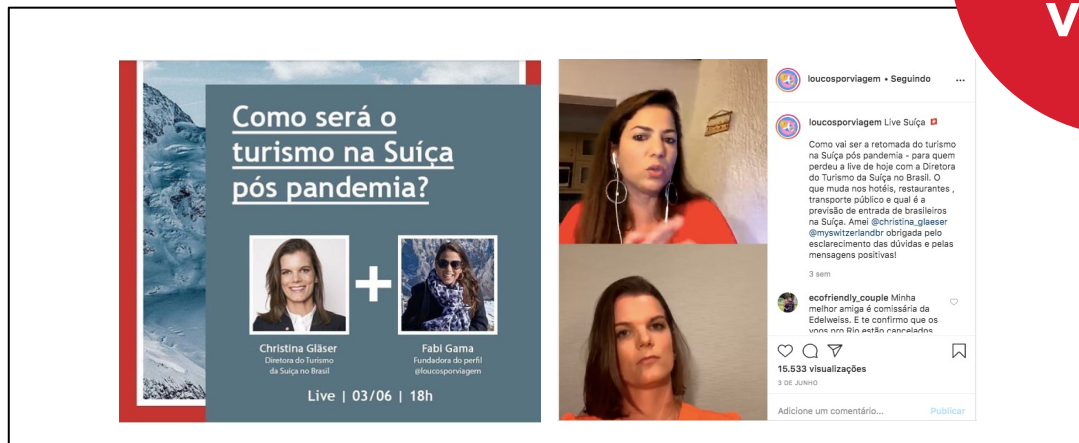
Esportes ao ar livre pós pandemia
 Bruno Moraes Personal Trainer e Guia de Trekking no Alto Sulci
 Karina Oliani Médica de Emergência e Multiesportista
 Live | 09/06 | 17h

karinaoliani • Seguindo
 myswitzerlandbr como paraíso dos esportes outdoor
 Quem quer ir pra Suíça- Vale a pena assistir! Com o @swissando e @bruno.pttrainer - num dos países mais charmosos e bonitos do mundo

myswitzerlandbr Foi incrível... Que bom poder rever pelo IG! 3 curtidas Responder
 mlmarmo Adorei a live! Você como sempre postando conteúdos muito legais! Mas

8.475 visualizações
 9 DE JUNHO

99'221 views

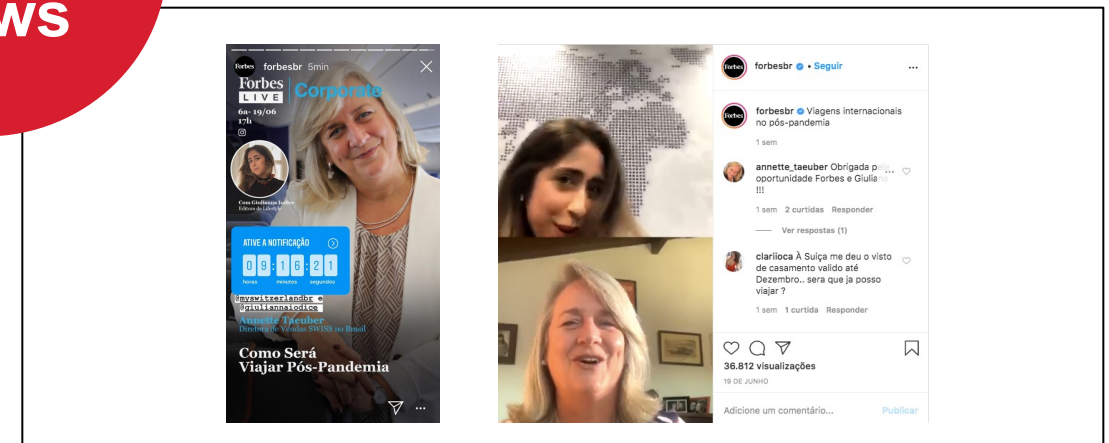


Como será o turismo na Suíça pós pandemia?
 Christina Gläser Diretora do Turismo da Suíça no Brasil
 Fabi Gama Fundadora da perfil @loucosporviagem

loucosporviagem • Seguindo
 loucosporviagem Live Suíça
 Como vai ser a retomada do turismo na Suíça pós pandemia - para quem perdeu a live de hoje com a Diretora do Turismo da Suíça no Brasil. O que muda nos hotéis, restaurantes, transporte público e qual é a previsão de entrada de brasileiros na Suíça. Amei @christina.glaeser @myswitzerlandbr obrigada pelo esclarecimento das dúvidas e pelas mensagens positivas!

ecofriendly.couple Minha melhor amiga é comissária da Edelweiss. E te confirmo que os vinhos nem são os melhores!

15.533 visualizações
 3 DE JUNHO



Como Será Viajar Pós-Pandemia
 Annette Tæuber Diretora de Turismo Suíço no Brasil

Forbes LIVE Corporate
 ATIVE A NOTIFICAÇÃO
 00:16:21

forbesbr • Seguir
 Viagens internacionais no pós-pandemia
 annette.taueber Obrigada por oportunidade Forbes e Glúlia!!!
 clariloca A Suíça me deu o visto de casamento válido até Dezembro... será que já posso viajar?

36.812 visualizações
 19 DE JUNHO

Segmentation.

Luxury and Unique Experiences.

Glamurama

NOTAS FOTOS MODA BELEZA MODODEVIDA PELOMUNDO PODER E-COMMERCE

28.01.2020 / 17:56

Iara Jereissati acaba de voltar de temporada de esqui com a família em St. Moritz e dá dicas quentíssimas de lá

COMPARTILHE:   



Iara Jereissati em temporada de férias em St. Moritz // Divulgação

- The luxury market keeps growing every year.
- Segment with most potential for destination Switzerland (exchange rate).
- Brazilian travelers look for experiences that “money can’t buy”, Brazilians wants to live the luxury and not only buy luxury.

+ LUXURY (A,AAA)



Suíça.

Need

Anna



Need:
Social relationships

Markus



Need:
Outdoor sports

Francesca



Need:
Time for relationship

Jasmin



Need:
Hygiene & Safety

Sophie



Need:
relaxation

Matteo



Need:
Discovering Switzerland

Céline



Need:
Travel at low cost

Jona



Need:
Playing outside

Matching offers

SHORT
TRIPS

OUTDOOR
SPORTS

ROMANCE

CLEAN &
SAFE

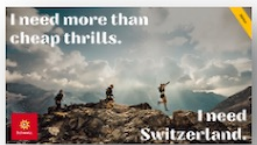
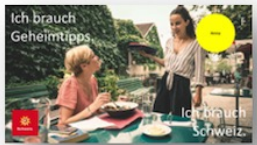
WELLNESS
& SPA

«BUCKET
LIST»

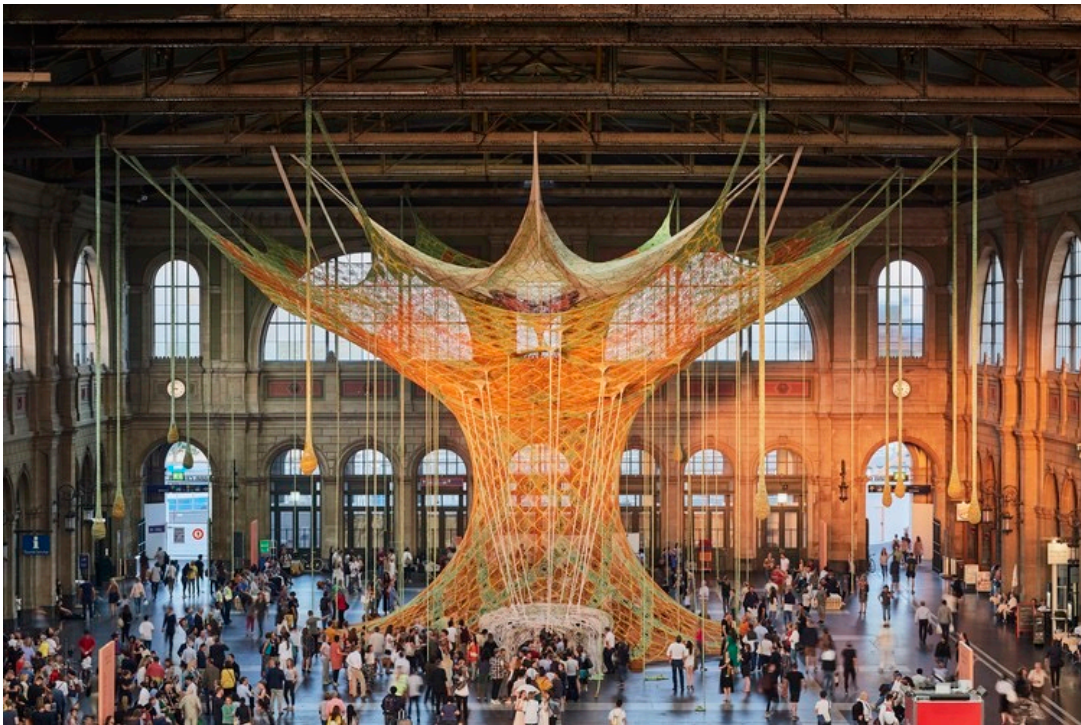
AFFORDABLE
SWITZERLAND

FAMILY

Matching assets



Arts and Culture.



- Aligned with Luxury Traveller.
- The Brazilian Art Collectors usually belong to high society and are owners of private collections (celebrities, opinion leaders and bankers).
- Women are the main art consumers in Brazil.
- São Paulo is the art hub of Latin America with the annual art fair LATAM “SP Arte”.

Wedding Destination.



- More than 1 million weddings are celebrated by Brazilians abroad every year.
- The mini wedding market is growing in Brazil, especially between rich people. They choose to travel with a few select guests for an unusual destination abroad.
- Switzerland always comes in the top 10 destinations of dreamed destination for a wedding.

Family Destination.



 **silviabraz** • Follow
St. Moritz

7w Reply

 **jaque.oliveeiira** @rafapilates
olha essa família lembrei de vo
❤️❤️❤️

5w 1 like Reply

— View replies (2)

 **biboccia** @lilianparra.nutri

1w 1 like Reply

 **carlapirassol** @karinarigolo

5d 1 like Reply

❤️ 💬 📍

 Liked by dehwerneck and
24,046 others

MARCH 3

Add a comment...

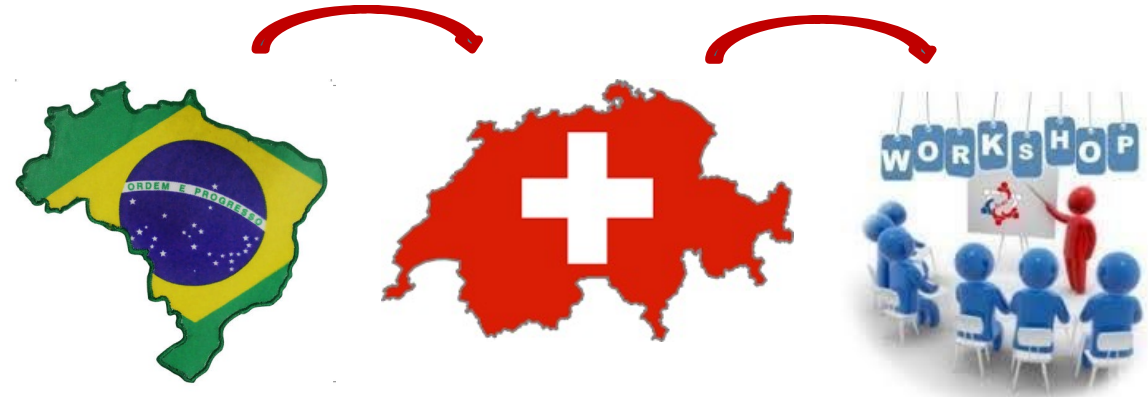
- Children's first in Brazil.
- Safe and easy travelling for families.
- Summer camps.
- ST Brazil focuses more on Influencers with families.
- Switzerland will be a top choice for a safe travel destination post-pandemic.
- Expansion of overnights with more rooms booked (kids, helper, etc..).

Selected Future Activities 2021.

KAM: Brazil Workshop in Switzerland.

Dependent on border opening

- ✓ Top 40 Brazilian buyers - 3 days / 2 nights.
- ✓ New opportunity for all Swiss destinations and suppliers to meet the best clients in our market.
- ✓ The program includes one-o-one meetings with selected suppliers and also networks sessions to have closer contact with the buyers.
- ✓ Post-tour programs for your destination can also be negotiated to be part of the workshop.
- ✓ Scheduled in Zurich on 3-5 September.



Post tour





Suíça.

KAM: Switzerland Travel Experience “on the road”.

- ✓ Pocket version of the successful STE Brazil format.
- ✓ 3 selected regions in Brazil.
- ✓ **Tentative dates: October 18th to 22nd, 2021**
- ✓ **Tentative destinations: São Paulo, Porto Alegre, Rio de Janeiro**

Goal:

- ✓ Getting closer to the travel agents by visiting their region of origin.
- ✓ Selecting the best buyers from different cities for a full Switzerland Travel Experience.
- ✓ Mix of workshops and network lunch/dinner.
- ✓ Offering extra quality time for the partners to build closer relationship with the buyers.
- ✓ The number expected of buyers will remain around 100 per city.



KAM: ILTM Latin America.

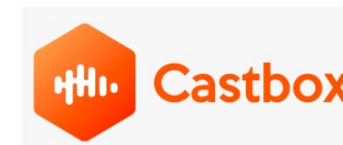
October 26-29, 2021.

- Combined with STE Brazil 2021, to leverage presence of Swiss suppliers.
- 390 buyers, 70% from Brazil, 30% from Latin America
- Special activation ST (photo points, TBD).
- VIP event on the sideline, Swiss Night.
- TBC: Martin Nydegger speaks in major plenary session.



KMM: Podcasts Brazil: Switzerland Series.

- Stats about podcast:
 - 59mio of Brazilians already podcasted.
 - 79% are podcasting while commuting
 - 67% bought something advertised on a podcast.
- Series of podcasts on different themes of Switzerland, such as art, gastronomy, wedding, romance, etc... in the form of an interview.
- 2 podcasts per month (30 min each).
- Part of our Key Partner Package 2022.
 - Dedicated content sharing



eMarketing: Swisstainable media kits.



- Leverage the strong Influencers / VIPs network of ST Brazil to raise awareness about ST's Swisstainable strategy.
- Media / gifts kits including Swiss sustainable products, such as Mammut, Victorinox, Lindt, Curaprox, Weleda, Swatch, Caran d'Ache, Suivie, Aromastick, Nestlé.
- ST will add a special message that can be Instagrammed / tweeted on SoMe for maximum online impact.



Promotions: Sao Paulo Art Fair 2021.

- Switzerland Tourism in Partnership with SWISS was present during SP Arte.
- 16th edition of main art & design fair in Latin America.
- 35'000 visitors – 71% AAA.
- ST / SWISS booth focusing on Swiss Cities with movie and brochures.
- B2C brochures including an art guide.
- Media and Social Media campaigns with Swiss Cities partners.



Promotions: Digital B2C Events. Partnership with Iguatemi Shopping Mall.

- Mothers Day (May) – Zoom with 30 influent mothers to position Swiss wellness hotels.
- Art Virtual Talk (June) – Zoom with Iguatemi clients to explore art in Swiss cities.
- Valentines Days (June) – Zoom with 15 couples to explore Swiss romantic tours.
- Audience: AAA (high luxury).
- Switzerland Tourism will offer for each event 1 hotel voucher (2 or 4 ON) by lucky draw and gift bag.

IGUATEMI DAILY

ST. MORITZ, DO DESTINO À MALA DE VIAGEM

QUA



RECOVERY: Ambassador's Digital Campaign.



- Celebrate the reopening of the borders with a big VIP event in SP gathering the most powerful influencers.
- Invite 5 key luxury digital influencers / celebrities to CH.
- Produce with each ambassador IGTV's in CH.
- Call for action: link influencers content to travel agencies with concrete business plans, for bookable premium products and experiences for interested travellers.
- 20'000 ON / 100 mio media contacts.



And many more!



Suíça.



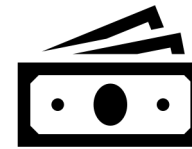
Outlook 2021 / 2022



Trade situation & perception on future travel trends. **.Suíça.**

Luxury segment.

- Clients see traveling as an escape from stress during Covid period.
- Clients have the money to travel.
- Most of clients are ready to travel as soon as the borders are open.
- TAs perceive and receive real concrete demand for travel (have been travelling during Covid).
- Best forecast for Switzerland: Winter 2021/22.



Most of the companies are active.

Main loss: Queensberry



Staff reduction:
20% to 30%



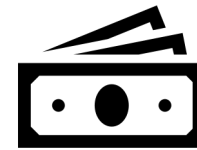
Most of the staff is working from home



Trade situation & perception on future travel trends. **Suíça.**

Generalist segment.

- Clients will travel international only from the end of 2021.
- Main demand will be for domestic and short-haul destinations.
- Clients are more conservative and will wait for clear travel regulations and/or vaccination.
- Best forecast for Switzerland: Summer 2022.



Most of the companies are active



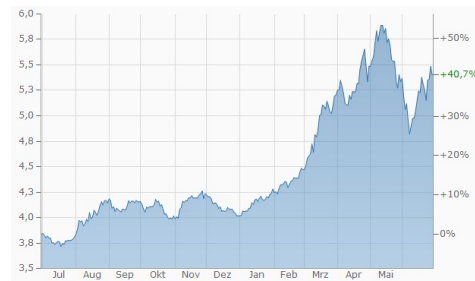
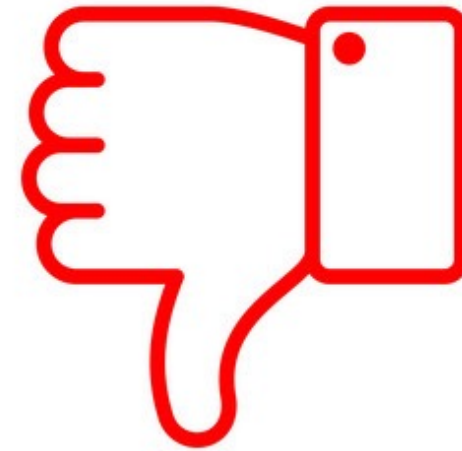
Staff reduction:
50% to 60%



Most of the staff is working from home

Market challenges 2021/22.

- Exchange rate 3,8 BRL/CHF (2019) → 6.1 (2021).
- Turbulent times: Political and economical crisis (GDP ↓).
- Slow vaccination campaign.
- Travel restrictions.



Opportunities with ST Brazil in 2022.



- **Epidemiological situation** forecasted to improve in the next weeks.
- **LX** frequency increase to daily flight up to June
- ON less affected ST's long-haul market in 2020 (**-69% 2020 vs 2019**).
- Brazilians very **pragmatic** and used to get out of crisis.
- Switzerland remains a **safe haven**, one of the best travel destination options (Clean & Safe, close to nature hideaway).
- **Luxury travelers** less affected by the crisis; ready to travel as soon as the borders are open, independently of travel protocols.
- ST / CH **strong positioning** in the market (ie. Google search).
- **Presidential elections** in 2022; optimistic outlook for Brazilian economy.
- **Recovery** will happen quickly once the borders are reopened.

Feel free to contact us anytime!

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Suíça.