



Market Updates

July/August 2022

Editorial

Dear Partners,

During the Spring and Summer months, most countries around the globe have started to relax or even completely deactivate their national CoVid protocols, with the effect, that the global markets have started their recovery path, leaving China as last exception behind. As after two pandemic years of reduced traveling, even price sensitivity seems to be reduced this summer season. This hunger for travel has brought the travel industry to its supply limits all along the tourism service chain.

The desperately awaited relief has arrived as well in terms of our activities. Especially offline activities, which had to be postponed again and again could finally take place as of June, and culminating on a series of larger trade and media events in late August to October.

While in China, where soft signs of a relaxation of CoVid measures at least give hope, that Asia's previous leading market might be bouncing back as of late 2022 or in early 2023, Russia is and remains disconnected from Europe. Even though travelling is still possible, and Russian travellers still find ways to Europe incl. Switzerland, we have put our activities on ice, and until further notice.

Thank you for your continued support!

Simon Bosshart, Head of Markets East



1. Priority Markets

BENELUX

Market Situation

General situation and Outlook

During this summer peak travel season, most TOs are reporting record figures, some of which are already higher than in the pre-Covid year 2019. The higher spending volume per trip/passenger is also striking. After the COVID years, more budget is being spent on travel. This positive situation is only clouded by the situation at Schiphol Airport, where bottlenecks with passenger processing and the associated long waiting times are likely to continue until winter. Staff shortages remain a major problem in all tourism sectors. Closer destinations, including Switzerland, are therefore likely to be travelled more by car this summer. The train connections to Switzerland from the Netherlands were also very well booked until the end of August.

We can expect very good numbers of overnight stays for July/August from the BeNeLux markets.

Campaigning & Activation

Meetings

Netherlands

Conferli - LinkedIn campagne 13/07.

Save-the-date SCIB Networking Event 06/10 Zilt op de Pier Scheveningen Keynote Speaker Gerrit Hiemstra (weather man). Theme: Climate.

Meeting Magazine - eNewsletters 4 new venues 06/07.

EventBranche - eNewsletter Swisstainabiliy 09/08.

Belgium & Luxembourg:

Save the date for SCIB Networking Events taking place in October sent to 689 contacts for 18/10
"Swisstainable: Empowering sustainable strategies for Events and to 297 contact for 19/10
"Sustainable catering for meetings & events.

Standalone eNewsletter to SCIB Database about Geneva

Winter & Cities

Netherlands

Value Zipper: Collabora



Summer & Autumn

Netherlands & Belgium

- Swisstainable Interactive Campaign with Honeyguides + Columbus Travel: trip to Switzerland (Bern, Ticino, Valais).

- Content Creator Trips to Switzerland for creating some Itineraries for MyS.com which will be used in 2023 again

- GoLive of two autumn campaigns in Belgium and the Netherlands. Both are content cooperations with publisher houses with publications in several titles. Main topic Swisstainable incl, STP Promotion and Nature Spa

- TV Production with Bern and Ticino for RTL Kampeer TV. Campaigning in the regions will be recorded to create some episodes. 6 days shooting

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Meetings

Belgium: MPI Summer pic-nic

Netherlands

INSPRE - festival Association for EventManagers (corporates) 25/08

Zurich & Andermatt study trip 26/08-28/08

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Media Trips

Individual Trips:

Pasar (BE): Ascona-Locarno

Fifty&Me (BE): Gstaad

VAB Magazine (BE): Genève

Runner's World (BE): Ultratrail Crossing Switzerland

BePerfect (BE): Zermatt

Trends-Tendances (BE): Lausanne, Lucerne, Locarno

De Zondag (BE): Ascona-Locarno

Cycling Magazine (BE): Alpes vaudoises

Runner's World (BE): crossing Switzerland



Deuzio Sudpresse (BE): Bern
TV show VTM (BE): research trip Aletsch Arena
Vojomag (BeNeLux): Engadin-Scuol
Telegraaf (NL): Genève
Lonely Planet Magazine (NL): Zermatt
Hoogtelijn (NL): 1/ Lugano 2/ Zermatt 3/ Nendaz 4/ Davos
Oppad.nl (NL): Luzern, Engelberg
50+ Magazine (NL): Genève
Margriet (NL): Vaud
KampeerKampioen (NL): Bern region
Wandelvrouw.nl (NL): 1/ Lucerne region 2/ Berne region
@sjoerdbracke (NL): Jungfrau, Zermatt, Aletsch
Winq (NL): Eurogames Bern

Media Top Coverages

Het Laatste Nieuws (BE): 100% Women world record
Het Nieuwsblad (BE): 1/ Lausanne & Vaud 2/ Jura 3/ Bern
Luxemburger Wort (LUX): Ascona-Locarno
Lonely Planet Magazine (NL): Europaweg Zermatt-Grächen

Media Newsletters & Press releases

Medianewsletter Trailrunning

Future Activities

Meetings:

Belgium:

29.9: after work MICE event at the Faculty Club
18 & 19.10: SCIB annual networking evenings in Brussels: Theme: Swisstainable.

Netherlands:

Webinar The Travel Club 06/09 Swisstainability.
Next - EventBranche booth and 4 x workshop sessions 19/09.
BTMF - MICE & Business Travel event with workshops 26/09.
Networking event Zilt op de Pier Scheveningen 06/10.



Summer & Autumn

- Autumn campaigns are running until mid October

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- Several alignment meetings are taking place with important buyers from the market
- STML participatiom



1. Priority Markets

FRANCE

Market Situation

-Despite the strong economic uncertainties due in particular to the war in Ukraine and the return of inflation, France saw a 0.5% growth in its gross domestic product (GDP) in the second quarter of 2022.

-French growth should reach 2.3% in 2022

-Acceleration of price increases and could reach an inflation rate of around 7% in September

-These forecasts are subject to considerable uncertainty: the curve will depend on the evolution of gas and commodity prices in the coming months

-In terms of tourism, France is returning to its pre-Covid performance. However the the inflationary trend is causing fears of repercussions as early as the fall

Source: LeMonde

Campaigning & Activation

SCIB :

- 13 articles de blog publiés, 14'436 pages vues sur la période sur l'ensemble du blog (il manque le visitorat des deux dernières semaines d'août).

MARKETING :

-Campagne digitale avec AdmySports sur les thèmes "randonnées" et "VTT avec comme objectifs de mettre en avant les possibilités dans la région du Valais et augmenter le trafic sur les offres touristiques du Valais et augmenter le nombre de réservations

-Campagne digitale effectuée avec TripAdvisor ayant pour but de promouvoir la diversité de l'offre de la Suisse s'est terminée et les résultats reçus sont au-dessus de nos espérances avec près de 20mio de vues sur nos bannières pub en 3 mois.

-Organisation de 2 voyages de presse en vue de nos campagnes été 2023 avec les médias EBRA et le Huffpost

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Rencontre avec une agence de voyage spécialisée dans les trains, mise en place de partenariats plus concrets.

Confirmation d'un participant pour le Switzerland Travel mart Luxury prévu début septembre



SCIB :

- "Networking Event Afterwork Lyon" - Soirée Networking pour agences et quelques corpos avec un Workshop pour rencontrer nos destinations et un atelier de montres avec Initium Watches. Complicé de trouver des participants car reprise événementielle forte et début des vacances d'été.

Destinations partenaires présentes: Genève représentant le Hilton, Initium Creawatch et Crans-Montana--> 14 participants, 22 inscriptions au départ mais 2 annulations et 6 no-show. Collaboration avec Reunir pour trouver de nouveaux clients corpos (non convaincant). Finalement 10 agences et 4 corpos sur place. Moins de monde que prévu mais clients très satisfaits de l'événement, intéressés par les destinations, quelques idées de projets en Suisse.

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Juillet/août sont des mois généralement plus calmes dû aux périodes de vacances scolaires. Néanmoins un nombre relativement élevé de voyages de presse ont lieu durant l'été 2022, notamment de grands médias nationaux. On peut citer, Tf1 (2 voyages), Le Figaro (à deux reprises), Télérama, Wider Outdoor (2 fois), France Inter.

Envoi d'une newsletter spéciale Rentrée aux médias

Future Activities

KMM :

Rentrés scolaires en septembre, envoi d'une newsletter dédiée à la rentrée fin août puis sur l'automne en septembre.

Voyage de presse sur le Trail Running en Valais début septembre

Voyage de presse de groupe Cities prévu en octobre

KAM:

Salon des Comités d'entreprise ELUCEO à Paris, au stade de France avec STS
Switzerland Travel Mart Luxury (1 buyer français)



1. Priority Markets

GCC

Market Situation

The economic situation in the GCC is still very comfortable due to the high oil price which gives all GCC countries room to manoeuvre, invest into new projects and provide salary increases to their local staff. An influx of 100'000 of Russians into the UAE during the past months gave the country and especially Dubai another boost, property prices have increased by 20-30% in just a few months. Travel agencies report great interest into Switzerland and Europe but complain about the long waiting times for a visa appointment. The hot and humid weather in Europe in June and July made a lot of Arab travellers to complain online - it will have an effect on the numbers.

Campaigning & Activation

- Recovery OOH. 16 large billboards among main roads in GCC (10Riyadh, 1Jeddah, 5Dubai). 15MAY -31AUG. Over 150Mio contacts.
- Celebrity Marketing: Emirati Soaud Al Kaabi visited Geneva, Vaud and Interlaken. Producing content resulting in 7.7M contacts.
- Large Snapchat video campaign for Manotel Hotel Group Geneva. 8.3Mio contacts.
- Snapchat video campaigns via snapchat channels Layalina, Ra2ej and Sa2eh for Crans-Montana and Made in Bern. In total 7,5Mio contacts.
- Several digital pushes for Luxury marketing via Facebook/Instagram. In total 1.5Mio contacts
- Several digital pushes for clinics via facebook/instagram. In total 2.5Mio contacts.
- Digital distribution via issue of Arabic health brochure. 136'000 views/reads.

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- In total 7 cooperations with different GCC touroperator in KSA, Kuwait, UAE and Qatar. Investments into distribution of FIT offers via flyers, digital, newsletters, ads, radio. In total around 15Mio contacts.

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TV team from MBC1 (most popular TV channel in the Arabic world) was in July in Switzerland, shooting 3 episodes in Gstaad, Zurich and Lugano. Distribution of the episodes in August and September. Projected contacts: 5Mio

Future Activities



- SEP: GCC Workshop with around 55 participants from the GCC. They meet around 84 Swiss partners
- SEP: STM Health with 15 participants from the GCC
- SEP: STM Luxury in Gstaad with 2 participants from the GCC
- OCT: Health Mission in KSA. Around 10 Swiss clinics participate and meet several authorities, clinics, doctors, dealers and health insurers in KSA.

Interesting observations

- Georgia, Turkey, Bosnia and Azerbaijan profit enormously from visa problems (long queues) of the European States including Switzerland.
- The heat in June and July was difficult for the Arabs travelling to Switzerland. Many complaints (online and offline) have been registered/received that it is too hot.



1. Priority Markets

GERMANY

Market Situation

Vertrieb

Der touristische Vertriebsklima-Index, den die Unternehmensberatung Dr. Fried & Partner für Deutschland ermittelt, sinkt im August zum zweiten Mal in Folge. Der Index, der im ersten Halbjahr eine starke Verbesserung erreicht hatte, bewege sich allerdings weiter auf einem hohen Niveau, das etwa dem im August 2018 entspreche, so die Autoren der Umfrage, an der diesmal 90 Reisebüros teilnahmen. Die aktuelle Lage wird von einer steigenden Anzahl der Teilnehmenden als schlecht bewertet (14%, Vormonat: 6%). Dennoch schätzt die Hälfte (53%) der teilnehmenden Reisebüros die Situation weiterhin als befriedigend ein. Immerhin ein Drittel bewertet die aktuelle Lage beim Vertrieb von Reiseleistungen als gut.

Verbraucherstimmung

Die Sorgen um unterbrochene Lieferketten, den Ukraine-Krieg und die hohe Inflation haben die Verbraucherstimmung in Deutschland auf einen Tiefststand geschickt. Das Barometer der Nürnberger GfK-Marktforscher misst jeden Monat das Konsumklima im Land. Zu den bereits bestehenden Sorgen kämen nun Befürchtungen um eine ausreichende Gasversorgung von Wirtschaft und privaten Haushalten im nächsten Winter, erläuterte GfK-Fachmann Rolf Bürkl.

Wirtschaft

Ifo-Konjunkturprognose vom 15. Juni 2022: Die deutsche Wirtschaft erholt sich seit Jahresbeginn von den zurückliegenden Coronawellen. Die damit einhergehende Normalisierung der Ausgaben in den konsumnahen Dienstleistungsbereichen verleihen der Konjunktur einen kräftigen Schub. Allerdings bremsen die hohe Inflation, der Krieg in der Ukraine und die anhaltenden Lieferengpässe die wirtschaftliche Erholung in nahezu allen Wirtschaftsbereichen. Das Bruttoinlandsprodukt wird im Jahr 2022 um 2,5% und im Jahr 2023 um 3,7% zulegen. Die Inflationsrate dürfte in diesem Jahr mit 6,8% den höchsten Wert seit dem Jahr 1974 erreichen. Auch im kommenden Jahr dürften die Verbraucherpreise mit 3,3% überdurchschnittlich stark steigen.

Währung

Die Inflation in Deutschland bleibt mit 7,5 Prozent Ende Juli 2022 auf hohem Niveau. Der Euro ist aktuell weniger als einen Franken wert und damit historisch schwach, was zu verteuerten Schweiz Ferien für die deutschen (europäischen) Gäste führt – allerdings wird dieser Effekt ein wenig von der hohen Inflation im Euroraum aufgefangen, da die Inflation in der Schweiz wesentlich niedriger ist.

Logiernächte aus Deutschland im Vergleich zu 2019: Juni: plus 2.1% ! Januar bis Juni: minus 15% (zu 2021: plus 108%)

Best practice competitors

Sehr auffällige Kampagnen von Onlineportalen (-brokern) wie Check24, Trivago, booking.com und AirBnB. Fokus auf Flug und mediterrane Destinationen. Produktkampagnen Türkei (Turkish Airlines, Istanbul, Türkei als Destination).



Campaigning & Activation

Die Schweiz elektrisiert: Grosse Digitalkampagne rund um die nachhaltigen Touring-Produkte Grand Train Tour of Switzerland und E-Grand Tour of Switzerland. Die Distribution erfolgte vom 8. Juli - 19. August über Social Media, digitale Netzwerke sowie eine Medienkooperation mit FOCUS online.

Winterthur x Weltkunst: Im Rahmen einer Medienkooperation mit einem der führenden Kunst-Magazine Deutschlands entdeckt der Offenbacher Fotograf Florian Albrecht-Schoeck Winterthur vom 21. - 24. Juli 2022 aus seiner Sicht. Begleitet wird er von der Weltkunst Redaktion. Die digitale Distribution folgt im September & Oktober.

STC Social Media Angebotskampagne: Es werden im Juli und August verschiedene Reiseangebote der Grandtour und der Grand Train Tour von Switzerland Travel Centre auf Social Media an User ausgespielt, die bereits vorher Videos der Touringkampagne gesehen haben. Ziel ist es möglichst viele Webbesucher auf die Angebotsseiten von STC zu erhalten.

Twitch Kampagne Interlaken: Zwei deutsche Creator auf dem Social Media Kanal Twitch inspirieren Ende August mit Outdooraktivitäten rund um Interlaken ihre Community.

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SCIB: Site Inspection in St. Gallen mit Meet Europe: Vom 25.-26.07.2022 fand eine Site Inspection mit Meet Europe, dem größten Netzwerk der MICE & Business Travel Branche der DACH Region, in St. Gallen statt. An den Tagen wurden Hotels und Locations für die anstehende Meet Europe Veranstaltung im Dezember 2022 besichtigt und ausgewählt. Auch wurde das Programm finalisiert und vor Ort besprochen. **Studienreise mit Agentur Proske nach Zürich:** Vom 28.-30.08.22 organisierte das Switzerland Convention & Incentive Bureau (SCIB) zusammen mit dem Zürich Convention Bureau eine Studienreise für die Agentur Proske nach Zürich. Es haben insgesamt 7 MICE-Planer aus Deutschland teilgenommen. **MICE by Melody Roadshow:** Vom 30.08. - 01.09.2022 nahm das Switzerland Convention & Incentive Bureau (SCIB) an der Veranstaltungsreihe „MICE by Melody“ als Aussteller teil. Es handelt sich um einen MICE-Branchentreffpunkt für deutsche Meeting Planer, der in drei Städten stattfand – Düsseldorf, Frankfurt sowie München. 7 Partner haben partizipiert: Engadin St. Moritz Tourismus AG, Kongresszentrum Pontresina by Saratz, Pilatus Bahnen, Kongresshaus Zürich, FIFA Museum Zürich, Dorint Hotel Airport Zürich, Davos Congress/Convention.

KAM Leisure: Swiss Ambassadors Programm: Reise mit 10 Teilnehmern aus Trade in den Regionen Bern, Graubünden und Tessin. Begleitet von 2 Personen von FVW-Medien und Nachberichterstattung auf FVW. **Webinare und Newsletter** für die Trade Kontakte mit je 50 Teilnehmern an zwei Webinaren

KMM

Event an der Leichtathletik Europameisterschaft in München für 27 Top-Kontakte aus dem Grossraum München aus den Bereichen Trade und Medien. Anschliessend gemeinsamer Stadionbesuch an der Leichtathletik-EM. Fokus auf die Ferienregion Bern und Swisstainable (special guest: Luca Hänni). Gleichorts VIP-Empfang durch BR Amherd und GK Bösch-Malinen mit 120 Gästen.

Medienreisen: Im Juli und August wurden 2 Gruppenmedienreisen ins Tessin (REKA-Feriondorf) und je eine Gruppenmedienreise nach Graubünden und ins Wallis durchgeführt, mit insgesamt 22 teilnehmenden Medienvertreter. Ausserdem konnten in diesem Zeitraum 44 individuelle Medienreisen



in die Schweiz organisiert werden.

Future Activities

Swisstainable Recovery Kampagne: Mit dem seit 2001 bestehenden, grösste europäischen Outdoor-Filmfestival **European Outdoor Film Tour** (E.O.F.T.) wird Swisstainable ab Oktober an die Gäste der Filmtour ausgespielt. Ziel ist, die Schweiz als Nachhaltigkeits-Leader bei einem breiten Publikum zu verankern. **Medienpartnerschaft** on/off-line mit der **FAZ-Gruppe** (FAS, FAZ, Quaterly) mit Erscheinung per Mitte September.

Swiss Cities: Winterthur x Weltkunst: Im September und Oktober werden die Kanäle des kunstspezifischen Mediums „Weltkunst“ in einer 360° Kampagne mit Inhalten von Winterthur bespielt. Im Zentrum steht die Erkundung der Stadt durch den Fotografen Florian Albrecht-Schoeck.

Digitale Städte Kampagne: Um die 9 „A-Partner“ Städte zu bewerben, reisen 3 Micro-Influencer nach Bern, Lausanne und Lugano und erstellen authentischen Content, der sich besonders gut für Social Media eignet. Im Nachgang folgt eine Social Media Kampagne, die affine User auf eine Microsite rund um Städtereisen lockt.

Trade/KAM Leisure: 2 Meet and Greet Touren und 1 KAM-Event in Berlin mit der Region Graubünden und Tour in Süddeutschland mit dem Tessin mit anschliessendem Tessinevent für 20-30 Tradekontakte in München. **Willy Scharnow-Stiftung für Touristik:** Vom 8. - 11.9.22 (Wallis) und 29.9.-2.10.22 (Jungfrau Region) finden Inforeisen mit jeweils 12 Reisebürovertreter*innen statt.

Medienarbeit (KAM/PR): 2 Mediendinner in München mit Graubünden und Mediendinner in Stuttgart mit Graubünden für jeweils circa 20 Medienschaffenden. **Winterlancierung** in München am 20.

Oktober mit den Regionen Bern, Graubünden, Tessin und Wallis. Präsentation der Winternews vor rund 40 Medien- und Branchenvertretern. **Städteevent** am 10. November in Berlin. Wir präsentieren die Schweizer Städte mit Fokus „Stadt und Natur“ vor rund 30 top Medienvertretern.

ÖV: Koop. mit der Deutsche Bahn: DB-Herbstkampagne „Sparpreis Europa“ vom 14.10. - 04.11.22 mit Integration Schweiz

B2C: MERIAN Travel Festival: Wir präsentieren vom 30.9. - 3.10.22 in Wiesbaden den Besuchern die Grand Train Tour of Switzerland

Interesting observations

Sehr auffällige Kampagnen von Onlineportalen (-brokern) wie Check24, Trivago, booking.com und AirBnB. Fokus auf Flug und mediterrane Destinationen. Produktkampagnen Türkei (Turkish Airlines, Istanbul, Türkei als Destination).



1. Priority Markets

GREATER CHINA

Market Situation

- Various local Omicron spread case, temporary quarantine on domestic travel
- Carriers add flights to China step by step, LH back to Beijing since 26July
- SWISS continue to suspend until Nov. 2022
- HKG: quarantine period reduced to 3 nights at designed quarantine hotel + 4 night self-monitoring (can back to work only if antigen test negative daily)
- HKG: F.I.T. is starting but group travel to Europe still not the time yet
- HKG: LX ZRH<->HKG will resume 1 schedule per week in Oct, will be more schedules by last Oct.

Campaigning & Activation

- "Culture Destination Switzerland" livestreaming Music Tour Xiaoming 23July
- "Culture Destination Switzerland" livestreaming Swiss summer music festivals 06August
- "Culture Destination Switzerland" Montreux Jazz Festival livestreaming 13July
- China International Travel Mart Smart City Tourism speech delivered by Daniela Chiani on behalf of ST
- Swiss Summer Camp Asia x On running: KOI + runners camp trip

KAM

- SCIB: Sales call tour Beijing August
- SCIB: Webinar training 15 July Zurich
- SCIB: Webinar training 25 August Geneva
- SCIB: destination wedding STA Module promotion
- SCIB: CTU Teacher training for Destination wedding and MICE business 8 July

- Trade Webinar July
- Trade Webinar August
- Digital sales calls July



- Digital sales calls August
- MySPRO trade invitations and training kick off
- HiSeas Chengdu Tourism Institute Webinar
- Zhejiaing Lishui Tourism Bureau Swisustainable Webinar

KMM

- Media trip hiking influencer in LAAX and Valais
- Media trip livestreaming on Douyin and Wechat video channel by influencer: JR, LLR, Rigi, Pilatus, Titlis, St.Moritz, Chur, LAAX, Ticino
- Media trip Chinese trail runner after Eiger Ultra Trail (3rd prize) in Jungfrau Region
- Media trip Swiss Youth Hostel for Art and Design magazine/China outdoor magazine, in Burgdorf, Mariastein, Sils, Saas fee, Zermatt, St.Moritz
- Media trip Swisustainable in Davos, Zermatt, Zurich for Traveler magazine

Future Activities

- SCIB: Sales call tour
- SCIB: destination wedding STA Module promotion
- Autumn media conference
- Autumn (social)media campaign
- ST travel TV livestreaming



1. Priority Markets

ITALY

Market Situation

Pandemic situation:

Masks still required in the public transports until Sept. (Eurocity, Milano -Chiasso with mask)

Touristic insights

Summer months difficult time to bring Italians to Switzerland (especially post-covid), According to a survey conducted by ENIT (National Tourism Organization) 72.4% of Italians dream of vacationing on beaches. According to the survey, 84% of Italians have chosen to spend their vacations in their country and 72.4% intend to do it by the sea. The climate (41.6%), the quality of the weather (28.3%) and the contact with nature (25.8%) are among the criteria for choosing a destination.

-> "water" experiences & thematics have to be a focus for summer promotion.

Campaigning & Activation

Media partnership with Cairo/RCS

May - July: summer campaign on different platforms (print, digital and social media) to promote Swisustainable and partners' experiences. Partner involved: Ticino, Made in Bern, Valais, Swiss Travel System, Hotel Cooperation. Contacts: 51 million.

Lifegate.it - branded Content

Content dedicated to RhB on Lifegate social Media and newsletter. Social reach: 240K

The Good Life - Newsletter

Newsletter contribution for Lausanne and Platforme10 on the Good Life + 3 sponsored newsletter with logo in June and July. Contacts: 20'000 subscriber each newsletter

Italian Weekender

Last part of campaign begun in April, until 31.08.2022

Partners: STS - Swiss cities - Basel

Geotarget Milano and Lombardia

-Display campaign in Lastminute.it (till end of August) 100k contacts



-Native advertising on premium sites (till end of August) 12'000 clicks expected

-Google adv - about 100'000 impressions to deliver

KAM

Fam Trip with Fiavet Association Swiss Cities

Promote Cities, territory and hotels to 5 travel agencies

Dates: 25.29.6

Involved partners: Luzern Tourism, Made in Bern, Zurich Tourism

Travel Academy il viaggio

30 Min training to 23 consultants and travel agents to promote Montreux and Vevey

Involved partners: Montreux City

KMM

Media results

- 18 million

- 16 journalists invited to Switzerland

- 1 media newsletter about Aare and Grindelwald gorge, view point Eggishorn, Diavolezza and Trenino Verde special offers.

Group media trip

- Trip in Ticino (20-22.07.2022) discovering Innerwalkproject, Via dei Sapori Bike and Lac Lugano;
Participants: 5 journalists.

Top coverage

- Reportage (10 pp.) about Monte Carasso on travel monthly magazine Bell'Europa (readers: 337'000;
publication date: 01.07)

- Article (2 p.) about 100% Woman World Record on weekly magazine Donna Moderna (readers: 1,2
million; publication date: 09.07)

- Reportage (7pp.) about Schilthorn, Jungfrajoch and Grindelwald on magazine Vita in Camper
(readers: 45'000; publication date: 01.08)

- TV reportage about Valposchiavo on La7 Eden (audience: 690'000; on air: 11.07)



Future Activities

Oct: Launch of new collaboration with Trenitalia/STS/ST with ambassador Michelle Hunziker to push train connections to Switzerland

Sept: Top Influencer trip to Bürgenstock (Chiara Ferragni: 27,7 Mio. Followers!)

Oct-Nov: Activation South Italy incl. KAM Roadshow in Padova and Verona (Mid Nov)

Nov-Dec: Winter Activation

Dec: Special winter project in collaboration ARMANI (winter outdoor fashion show in St.Moritz), ST global support



1. Priority Markets

NORTH AMERICA

Market Situation

After 9 years with ST NA, Pascal Prinz will return to head office as Director Global Accounts. Oliver Weibel, Project Manager Accommodation & Gastronomy will take over as Director Canada in November.

Source market USA had fantastic overnight figures in June with only -3.9% compared to record year 2019 with STS sales even surpassing 2019.

In Canada the airports have been able to reduce waiting times and travel inconveniences which were prevalent earlier in the year and Lufthansa Group reports excellent seat-load factor to Europe and Switzerland out of Canada.

Campaigning & Activation

Campaigning & Activation

- Campaigning & Activation: Swisustainable Push, continuously until Dec
- Campaigning & Activation: TSQ Billboard, continuously until end of Aug

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- Destination of the Month Campaign with Signature, July
- Virtuoso webinar Geneva/Lake Geneva Region, July 6
- Signature Educational Journey Switzerland, July 11 - 17
- Trade webinar with St.Gallen-Bodensee Tourism, July 14
- SCIB: Global Meetings Exchange Accor, SFO, July 18-22
- Trade webinar with Audley Travel, July 28
- 4-page Advertorial on Signature "The Travel Magazine", August
- Sales Visit key accounts Midwest, August 8 - 11
- Trade webinar with Glacier Express, August 11
- Virtuoso Travel Week Las Vegas, August 14 - 19



- Virtuoso Travel Week - Virtual, August 14 - 18
- Trade webinar with Basel Tourism, August 25
- AAA rewards trip, Graubunden, Lucerne, Bern Region, Valais-Matterhorn Region, August 29 - September 4
- Virtuoso Webinar Ticino, August 30
- Farewell lucheon Director Canada, Toronto, August 16 with top trade contacts

KMM

- 12-16.07.2022 NBC All Access Hollywood filming in the Bernese Region
- 14-16.07.2022 VIP Chef Marcus Samuelsson trip to Interlaken & Lavaux Region
- 28-31.08.2022 Press Trip to oSt Gallen for the Textile Museum Exhibition
- Jewish Heritage Media Press Trip to Geneva, Basel, Zuroch and Lucerne, historic ancient Jewish towns of Endigen and Lengnau, Liechtenstein
- Key Opinion Leader Alex Strohl collab for Liechtenstein & STS/RhB in Engadin
- Farewell lucheon Director Canada, Toronto, August 16 with top media contacts

Future Activities

KMM:

- Media Trip Arts & Culture
- TV production PBS in Lucerne, Zurich, Thune, Vaud and Gruyère
- TV Production Discovery Channel in Vaud, Valais and Geneva
- Exhibition St Gallen Textile Museum

KAM

- 4-page Advertorial on Virtuoso Life Magazine, September/October
- Trade webinar with Interlaken Tourism, September 8
- Virtuoso Webinar Zermatt, September 14
- ILTM Cancun, September 19 - 22
- Virtuoso Live Consumer Webinar, September 28
- Trade webinar with VALAIS-Matterhorn Region, September 29
- Adventure World Travel Summit Lugano, October 3 - 6
- Trade webinar with Lake Geneva Region, October 6
- Signature Webinar STS/Glacier Express, October 7
- North America KAM workshop Valais, October 10 - 14
- Trade webinar with Zurich Tourism, October 20

Campaigning & Activation

- Campaigning & Activation: GoPro Creator Summit, Sept
- Campaigning & Activation: Art & Culture Cities Campaign, Sept
- Campaigning & Activation: Swiss Travel Pass Push, Oct
- Campaigning & Activation: AFAR Winter campaign, mid-Sept-Dec



1. Priority Markets

UK/IRELAND

Market Situation

General overview UK

The recovery of the UK economy has slowed down in the first half of 2022. Cost of living is increasing, mostly due to higher energy cost, but also everyday items such as groceries and transportation, with a record inflation of over 10% in July 2022. The exchange rate GBP-CHF has been at historic lows - as low as 1.15 CHF per GBP - which makes Switzerland more expensive.

UK Travel Market

Nevertheless, the British are known for their pragmatism and are more than willing to travel abroad again after almost two years of various levels of "lockdown" and some of the strictest travel bans. As in other countries, middle- and upper-class consumers have considerable amounts of discretionary wealth available after the crisis, which they now want to spend for travel and to treat themselves to a premium holiday experience. And these consumers, our main target group, suffer less from the challenging economic environment.

Travel to Switzerland

Over the first half of 2022, the number of overnights from the UK in Switzerland is still down by about 25%. However, in the two only winter months with very limited travel and Covid restrictions, February and March, overnights from the UK in the Swiss Alps (not the cities, though) were almost back to 2019 level.

Also, British travellers are spending significantly more on their Swiss holidays than before Covid. One of our key operator partners shared that their clients spend on average 27% more on their Swiss holiday than in 2019.

Direct flight connections have been reinstated and were supposed to reach about 80% of pre-crisis level in the summer of 2022. However, after major issues in air travel in early summer – great numbers of cancelled flights, long waiting times, baggage issues - created negative headlines in the UK and beyond, UK airports cut their capacity and forced airlines to reduce the number of flights.

Opportunities for Switzerland

The loyalty of British visitors remains high. The "lakes and mountains", "scenic trains" and "snow sports activities" in Switzerland remain popular.

An increasingly important role, both in the travel industry and among consumers, is sustainability. Here, Switzerland is very well positioned.

With leisure travel going well already, albeit restricted by air travel issues, and business travel recovering slowly as well, we are confident that in 2023 we reach the 2019 numbers or even overpass them.



2. Active Markets

AUSTRALIA

Market Situation

Earlier this year, Australia's inflation rate has reached 6.1%, the fastest annual increase in 21 years. This means, Australians are paying more for everything, including food, fuel and of course travel. Nevertheless and despite all of these issues and potential doom and gloom stories, Australians are continuing to schedule international travel plans. After more than two years of hard border closures, travellers are itching to get back out on the roads.

Australians seem to be less price-sensitive and are willing to pay the higher price. This is an enormous advantage for Switzerland. Given the fact that many Asian countries are still (partly) closed, gives Europe and Switzerland an additional boost as Australians can't travel there.

Campaigning & Activation

Switzerland Winter Festival at Bondi Beach: Switzerland branded signage around both sides of ice rink on Bondi Beach, Social media partnership, Recognition on key print materials (festival guide, website, sponsor board, Red Switzerland deck chairs across the Festival precinct, branded staff and volunteer uniforms. Various VIP events on ice rink for media partners and trade. Over 300,000 visitors during school holidays.

Swiss Winter Village at Canberra Center: Sponsored workshops, cheese tasting by Red Cow, Wreath making, Candle making, Gluehwein Bar Friday nights, VR experience, Switzerland competition. Several touchpoints & reach withing the Center. In-centre: Winter village, digital screens, digital wayfinders, static banners, external forecourt banners.

Digital: Website, EDMs, SoMe, monthly Wi-Fi Logins

Chillfactor Magazine: Podcast about Switzerland with Reggae Elliss. ST as presenting partner - voiceover Presented by Switzerland Tourism.

Swiss APAC Summer Camp incl. post tours: 4 Influencers from the Australian trail running community attending the first Swiss Summer Camp to St. Moritz. Various post-tours to different Swiss regions planned.

Switzerland as part of the European Travel Commission Australia Chapter (ETC) consumer Campaign, focusing on the Australian market. Digital campaign, promoting the global campaign 'Europe invites the Curious'.

KAM



Switzerland Winter Festival at Bondi Beach. Exclusive Trade event on Ice Rink had to be cancelled due to the heavy rain. Instead, tickets for the ice rink plus a mailing with e-news have been sent to the trade to enjoy the Switzerland ice rink by themselves.

Travelplan Ski Training are one of Australia's largest ski tour operator. Due to an increase in enquiries, a dedicated Switzerland ski resorts training has been presented to their growing reservations team.

Switzerland as part of the European Travel Commission Australia Chapter (ETC) was headline sponsor at the inaugural Trivia night of the Council of Australian Tour Operators (CATO). Sponsorship included a dedicated press release, top billing in all marketing and advertising, event tickets, 10x trivia questions, double page ad in program, video and speech on the night, SoMe messaging.

KMM

Switzerland Winter Festival at Bondi Beach. Exclusive media event on Ice Rink had to be cancelled due to the heavy rain. Instead, tickets for the ice rink plus a mailing with e-news have been sent to the VIP media partners to enjoy the Switzerland ice rink by themselves.

WILD Magazine: 1x full page ad and 1x eDM newsletter banner in August issue. Focus on hiking and outdoor activities in Switzerland.

Thea Bainbridge (Travel Associates) interview on Australia Today. Radio interview about Glacier Express and Excellence Class.

Travel & Cruise: Double page spread, focus on Switzerland Winter Magic Tour.

STS Excellence Talk Promotion in Trade Media (KarryOn).

Sponsoring Podcast "Holidays to Switzerland" in July & August. Focus on Magical Places and UNESCO World Heritage Sites.

Media Trips:

>AUG/Swisstainable (International Traveller)

>Media Trip Individual Cities (Mindfood)

>Media Trip support with STP (PR agency – 2 trips July & Aug)



Future Activities

Switzerland Travel Experience Roadshow, 8 - 16 September 2022. Multi-city roadshow in Melbourne, Sydney, Brisbane, Auckland and Christchurch. Trade (agents) events, media functions and 1on1 sales calls meetings with tour operators. 9 market key partners from Switzerland live at the event. Hybrid format in Sydney, including panel discussion on post-Covid challenges and Swisstainable.



2. Active Markets

AUSTRIA/HUNGARY

Market Situation

Starkes Reiseaufkommen / Outgoing genauso wie Inlandstourismus. Sehr niedrige Arbeitslosenzahl bzw. hohes Beschäftigungsniveau. Reiseveranstalter melden gute Buchungszahlen - auch für die Schweiz. Allerdings auch die große Sorge durch den starken Franken:

„Wenn eine Panoramabahnreise, die aktuell für 1.600,- verkauft wird, im 2023 nun die „Schallmauer“ von € 2.000,- durchbricht, wird es sicher sehr deutlich wahrnehmbare Rückgänge geben!“

Konsumentenvertrauen nimmt etwas ab, bzw. Vorsicht auf Grund der hohen Inflation nimmt zu - zum Nachteil von u.a. Reisen in die Schweiz. Allerdings kommt der Schweiz auch wieder die Nähe und die Sicherheit zu Gute.

Campaigning & Activation

1. Juli 2022: 2-seitiges Advertorial „Swisstainable“ im Falstaff Magazin (gesamt DACH-Raum mit gesamt 142'000 Stück Auflage). Ergänzt durch einen 12-seitigen redaktionellen Artikel

15. - 20. August 2022: IDT Internationale Deutschlehrer Tagung. Insgesamt kommen 3.000 Deutschlehrende aus der ganzen Welt nach Wien, wo die Schweiz mit eigenem Auftritt präsent sein wird.

15. August - 2. September 2022: Recovery Digitalkampagne zur Promotion des Herbsts in den Schweizer Städten mittels Native- und Display Ads auf österreichischen Premiumportalen sowie Outbrain & Taboola

15. August - 2. September 2022: Key Partner Digitalkampagne „Kulturherbst in St.Gallen“ mittels Social Media Ads, Native- und Display Ads auf österreichischen Premiumportalen sowie Outbrain & Taboola.

KAM

Corps Touristique:

6. Juli Sommerveranstaltung mit 30 anderen Tourismusverbänden in Wien

FAM Trips:

Eurotours: in Bern und Basel (Anfang Juli) mit jeweils zwei Eurotours Production Mitarbeiter. Für 2023



soll die Präsenz an buchbaren Produkten von den Städten verstärkt werden.

Recovery Budget:

H2 Vereinbarung von CHF 30.000 mit Eurotours (Aldi Suisse, Hofer Reisen, JustAway.com) abgeschlossen. Nach dem die Investition in H1 von CHF 35.000 erfolgreich war und dies zu insgesamt 32.000 Übernachtungen in der DACH Region beigesteuert hat. Davon waren 2.600 aus AT via Hofer Reisen.

KMM

Presse e-Newsletter:

Im Juli und August 2022 wurden 2 Medienaussendung an je 210 österr. JournalistInnen versendet.

Tourismuspresse.at-Aussendungen:

Im Juli und August 2022 wurden 3 Tourismuspresse.at-Aussendungen zu an je ca. 33'500 Kontakte versendet.

Future Activities

- 1. Woche September 2022: Top am Counter 8-Seiten Schweiz Spezial
- 14. September 2022: Presseevent „Schweizer Boutique Städte“ in Wien
- 2. Septemberhälfte 2022: STS Herbstpromotion (4-Tagespass) mittels Social Media Ads in Österreich
- 22. September 2022: ÖRV (Österreichischer Reisebüroverband) Aperio in der Schweizer Botschaft
- 22. - 25. Oktober 2022: ÖRV Kongress mit 60 Mitgliedern in der Schweiz (Luzern, Chur, Poschiavo)



2. Active Markets

BRAZIL

Market Situation

Economic situation inspires caution. It is possible to be detected in two tendencies affecting international travels: the valorization of the American and Europeans currency, and the gradual retreat in commodities' prices. The figures, at this moment, are positive for the Brazilian economy. The question is that the probability of an economic recession in 2023 gains power continuously. Therefore, the current positive data should be celebrated, but also keeping an eye on the several challenges ahead that Brazil, and the world, will have to face in the near future.

In sectors like travel operators and travel agencies, the cost challenges are high, and the traveler counts with these professionals' expertise to manage fitting the trip in their budgets.

In a year when the Soccer World Cup is taking place, a break in the businesses is expected during the tournament (November/December), with vacations in January and February promising a return to normality. If the international travel costs continue to skyrocket, the domestic market will absorb this demand, but also with prices that haven't been seen in resorts, hotels, and national attractions in a long time.

Travel trade is quite overwhelmed with numerous requests, facing difficulties to replace professional staff for presential working as many of them decided to move 100% home office based.

Switzerland is not the highlight anymore, with all borders opened, easing of travel regulations and new flights to Europe, travelers are moving back to traditional top-of-mind destinations like Italy, France, Portugal and Spain.

- FM

Best practice competitors

COURCHEVEL has increased their presence in the Brazilian market with massive investment (approx EUR 400k/year gross)

They hired a representation company named Boarding Gate to run several activations with travel agents, influencers and media to push next winter season and consolidate Courchevel in the market.

- FM



Campaigning & Activation

Taste of Switzerland

Special activities in partnership with General Consulate in São Paulo

August 11th to 13th 2022: Special Swiss menu at Tivoli Mofarrej Hotel

- Between August 11th to 13th Tivoli Mofarrej Hotel offered special menu prepared by 3 Swiss chefs from Engelberg
- Swiss specialties: Fondue and Raclette
- Event sold out before first day

August 10th: VIP Dinner

- Special dinner for 60 VIP guests to promote “Taste of Switzerland” events at Tivoli Mofarrej Hotel
- Presence of:
 - . 16 travel agents
 - . 24 VIPs and media guests
 - . 20 VIP guests from Consulate in São Paulo
- Goody bag with StraPa giveaways: Lindt.

KAM

July Newsletter KAM

- Highlight: Lausanne & Montreux Riviera
- 02 sendings: July 1st and 19th
- Mailing: 26.500 mails for travel agents, 160 mails for corporate travel managers, 1.800 WhatsApp messages to TAs
- Opening rate: 37,00%
- Link newsletter:

<http://smtp.mailnewsdobrasil.com.br/email/SUICA-03DE03-2021/suica-03de03-2021.html>

July 18th to 24th: TTW Group + Kempinski Famtrip

Engelberg, Frutt, St Moritz



- TTW Group Famtrip to:
 - . Engelberg: Kempinski Engelberg
 - . Frutt: Frutt Lodge
 - . St Moritz: Kempinski St Moritz
 - . Glacier Express
- 8 participants, 6 travel agents
- Support with experiences and meals on destinations and Swiss Travel Pass

August 03: STS training at TTW Group

- Swiss Travel System presentation
- 35 travel agents from TTWLab + TTW Group operations team present during the presentation
- Dedicated Q&A session with agents
- Breakfast sponsored by Switzerland Tourism

August 5th: KAM/Media return: TTW Group + Kempinski Famtrip

- Voe News
- Page views: 25,501
- Unique visitors: 25,501
- Audience: 510
- Segmentation: Attractions tourer, nature lover.

KMM

August 1st: GToS Viagem News

- Special GToS content at Viagem News website.
- Highlight destination.
- Page views: 566.356
- Unique visitors: 283,178
- Audience: 5.663
- Segmentation: Attractions tourer, nature lover.



Taste of Switzerland

- August 10th: Media Lunch and Workshop
- Special lunch with fondue workshop to promote “Taste of Switzerland” events at Tivoli Mofarrej Hotel
- Presence of 15 journalists during the workshop
- Goody bag with StraPa giveaways: SWISS, Victorinox, Lindt

Future Activities

KAM

- Brazil Workshop in Zurich: Aug 26 to Sep 01
- Relais & Châteaux famtrip: Sep 03 to 12
- STM Luxury: Sep 04 to 09
- STM Health: Sep 11 to 17
- Sales call winter season: Sep 26 to 30
- Rogeria Pinheiro Retreats, immersive training: Oct 18 to 21

Interesting observations

COURCHEVEL has increased their presence in the Brazilian market with massive investment (approx EUR 400k/year gross)

They hired a representation company named Boarding Gate to run several activations with travel agents, influencers and media to push next winter season and consolidate Courchevel in the market.

- FM



2. Active Markets

CZECH REPUBLIC

Market Situation

- Czechs are travelling and several tour operators informed us that they have completely sold out Switzerland offer for 2022 and they are adding new Swiss offers.

- Covid-19 situation stable with low level of new daily cases, total of 986 people in hospital and possibility to take another dose of vaccination. No restrictions in the market at all.

Economics:

- GDP of 2Q/2022 +3,6 % (1Q/2022 +4,9 %; 4Q/2021 +3,6 %)

- Consumer price index in July 2022 +17,5 % (May 2022 +16 %; March 2022 +12,7%; January 2022 +9,9 %)

- Inflation rate in July 2022 +10,6 % (May 2022 +8,1 %; March 2022 +6,1%; January 2022 +4,5 %)

- Industrial production in June 2022 +1,7 % (April 2022 -3,8 %; February 2022 -0,3%; December 2021 -2,1 %)

- Construction production in June 2022 +0,8 % (April 2022 +4 %; February 2022 +18,9%; December 2021 +8,1 %)

- International trade – import: +15,9 % in June 2022 (+13,3 % in April 2022; +16,5% in February 2022; +19,9 % in January 2022)

- International trade – export: +15,3 % in June 2022 (-1,3 % in April 2022; +7% in February 2022; +8,2 % in January 2022)

- Average gross wages and salaries +7,2 % in 1Q/2022 (+4% in 4Q/2021, +5,7% in 3Q/2021)

- General unemployment rate in June 2022 2,5 % (May 2022 with 2,5 %; March 2022 with 2,4 % and 2,3 % in January 2022)

SOURCE: Czech Statistical Office, www.czso.cz

- Exchange rate: 1,- CHF = 25,49 CZK valid for 16. 8. 2022

SOURCE: Czech National Bank, www.cnb.cz

Campaigning & Activation

- 12. 7. – Davos Klosters partnership with Swiss-Czech golf tournament by HST with active DDK participation by its representative Andreas Stoffel

- 14. 7. – ST Newsletter 7/2022 focused on July 2022 with promotion of: guest cards in various regions; guest cards in Lower Engadin; new edition of magazine Switzerland nr. 5; GToS with Roger Federer; photo exhibition Swiss architecture by ST / HST and Laufen in Prague; e-bike ride package



by Davos Klosters; Tree tent offer by Pilatus; adrenaline rides from Brambuesch in Chur; nostalgic rides by RhB from St. Moritz to Poschiavo; Alphorn players at Schynige Platte; free transport tickets for guests in Wallis; Niesen Hiking ticket; STS mobile app (incl. promotion of Pilatus, Stanserhorn, Zermatt, SGV); 75. Locarno Film Festival; photo of the month from Zurich. On-line banner in the newsletter: Trail days – Bike hotel and free bike guide in Davos Klosters

- 15. 7. – Week video paid FB campaign with promotion of Schilthorn and its summer possibilities
- 18.7. – GToS and GTToS promotion in form of photo slides played in 16 TV screens in shopping center OC Atrium Flora in Prague focused on: ESSVM, DDK, Schilthorn, Pilatus, Aletsch Arena, Zermatt Bergbahnen, Niesen, SGV, JFB, Rigi, RhB, Gruyères, Bern, Zurich, Rhine waterfalls, Tremola, Chillon, Geneva and Basel
- 19. 7. – 6 weeks photo exhibition focused on Swiss architecture placed in art gallery and showroom of Laufen in center of Prague
- 28. 7. – HST / ST celebration 1. August at the residence of Swiss Ambassador in Prague with HST VIP guests incl. provided activities for children at the event by ST (coloring pages with trains, stringing beads, Swiss railway puzzle)
- 1. 8. – RhB TV & Digital promotion in form of: HbbTV banner with QR linked to RhB educational contest at MojeSvycarsko.com (broadcasted at TV Retro), on-line banner campaign at website of the TV station and SOM promotion at TV FB page
- 5. 8. – Week video paid FB campaign with promotion of Pilatus and its summer possibilities
- 7. 8. – GTToS paid 8-weeks FB campaign - each week with paid video presenting one section of the GTToS
- 18. 8. – Month digital contest with influencers and one of the biggest youtuber in the market linked to educational contest at MojeSvycarsko.com where two winners will get possibility to participate in summer influencer group trip in June 2023

KAM

- 3. 7. – CZ participation at Intl. FAM trip “Art, Culture & Design” (1 PAX from TO Salve tour)
- 15. 7. – B2B KAM Newsletter 7/2022 to TO’s, TA’s and MICE representatives in CZ and SK with promotion of: new organization structure in CZ market; covid-19 travel update; MySwitzerlandPRO.com; new photobank sam.myswitzerland.com; DDK news (Jakobshorn, summer guest program, Davos Klosters Premium Card, hotel Alpine Inn); RhB B2B website; Alphorn players at Schynige Platte; B2B package “Idyllic Switzerland” by Schilthorn Cableway; new cable car Matterhorn Glacier Ride II + PDF of Zermatt Bergbahnen with its B2B news; Pilatus Bahnen new contact person for CZ market + B2B updates and photos of new trains; STS new contact person for CZ + myGTToS booklet; invitation to photo exhibition Swiss architecture in Prague
- 13. 7. – Sales calls for Davos Klosters in Prague with meetings with TO CEDOK and TO Experitour in Prague

KMM

- 1. 7. – 1/1 RhB advertorial in Leo Express with main topic “Hiking with RhB” with integrate promotion of Via Albula/Bernina, Landwasser viaduct with Tschutschubahn, Morteratsch, Cavaglia and Alp Grüm hiking from Ospizio Bernina



- 5. 8. 2022 - Swiss railways indiv. media trip of 1 journalist from biggest newspapers in the market - MF DNES
- 10. 8. – 4-days individual media trip of SK lifestyle magazine Rytmus zivota to Chur, Val Ospizion and Alp Grum with focus on RhB and hiking possibilities along RhB railway network (1 PAX)
- 12. 8. – 8-days TV media trip of travel broadcast Objektiv to Bern, Gruyeres, Schilthorn and Lucerne (incl. Pilatus, SGV, Verkehrshaus)
- 14. 8. – CZ participation at Intl. Media Trip Travelling the Swisustainable way (1 PAX)
- 16. 8. – 7-days individual media trip to Liechtenstein and St. Gallen with focus on traditional crafts, gurnet and bike possibilities for magazine
- 16. 8. – Individual bike media trip of bike magazine VELO to bike event Swiss Epic in Davos Klosters (2 PAX)
- 24. 8. – 6-days individual media trip to Switzerland with focus on railways and hotels for one of the biggest printed and on-line newspapers Pravo / Novinky.cz (2 PAX)

Future Activities

- summer edition of printed magazine SWISSmag
- ST Newsletters (B2C & B2B)
- various media trips
- various advertorials
- 4. 9. – STML 2022 with two exclusive tour operators (Axamit Travel, EliteVoyage)
- 10. 9. – Switzerland at Regional railway day in Prague 2022 (cooperation with Czech Railways)
- 28. 9. – ST Middle Europe Workshop in Mürren with 13 TOs and 1 KMM
- ST Press conference – WINTER 2022/2023
- Sales calls for Pilatus-Bahnen AG in Prague



2. Active Markets

INDIA

Market Situation

At present, there are two issues that limit, or at least require the customer to be more flexible in choosing the period in which to take their holiday. On the one hand, the cost of flights, a bit like everywhere else at the moment, more expensive than in the past. On the other hand, the question of visas. We are in an anomalous situation, i.e. not all Embassies are back to full capacity in terms of granting visas. Some, given the huge demand, have suspended visas as they are unable to respond, others are issuing very low numbers. This is putting pressure on our Embassy in Delhi, which is having to deal also with a large number of applications that do not have Switzerland as their main interest, with the risk of visa shopping and has therefore had to put a cap on the number of visas granted for the coming months. We are, however, in constant contact with them to try to manage the situation as best we can, coordinating communication with the tour operators involved.

From the tour operators, however, we are getting positive signals of flexibility on the part of the end customers to postpone their holidays. The desire to leave for holidays is understandably great after two years of being unable to travel. These will probably also be visible in the statistics of the months ahead, which would confirm the trend of taking holidays even in less classic months (a trend that had already started before Covid, but now given the circumstances, should continue into the future).

In absolute figures, **the month of May**, the first month that can be considered typical for Indian holidays, fared much better than April 2022. For this month we recorded **18,353 arrivals** which in turn generated **43,203 overnight stays**. In percentage terms, this corresponds, when compared to 2019, to a drop in arrivals of 76.5% and in overnight stays of 74.7%.

As for **June**, there was still an increase in arrivals (24,013) and overnight stays (56,566) compared to the previous month. Compared to the same month in 2019, however, the drop was 64.9% in arrivals and 62.5% in overnight stays.

Compared to a "normal" year, where May usually records higher numbers than June, June did better than May this year.

This bodes well for an extension of the holiday season, where there is usually already a decline in June. Various situations (delayed entry into force of the new entry regulations for Switzerland - i.e. the abolition of the 270-day vaccination requirement as well as the visa situation, but also the cost of air travel, etc.) have forced Indian tourists to reconsider their holiday calendar. What we hear from the tour operators are exactly the indications for those who could not travel in the classical months and organise for the less usual months for long haul trips.

Covid situation in the country: As is somewhat the case throughout the western world, cases in India have also increased in recent months, but remain at a very low level, considering the size of the country. The average daily infection rate is around 15,000 to 20,000 cases. Basically all restrictions were lifted months ago.

Campaigning & Activation

1. CNBC TV Trip – 100% Women's Only

- CNBC TV 18 – the Indian arm of CNBC TV, the largest business news TV channel and news portal covered the 100% Womens World record. In addition, the anchor herself participated in the record



climb.

- ST India tied up with them to produce a 30 min episode on the climb and three 2-minute videos as – Travel diaries of Shibani Gharat (their star anchor) – to showcase summer in Switzerland.

- Each 2-minute video did focus on each location namely Interlaken, Zurich & Zermatt – all targeting the summer travel segment and the repeat was telecasted on CNN

Social media coverage on CNBCTV18 and the celebrity anchor's handles.

Total viewership – **816'666**

2. Double Page Print Advertisement in magazines

- Swisustainable advertisements were published magazines namely:

a. Conde Nast

b. India Today Spice

- Total Circulation: **340'000**

- Total Contacts: **1'700'000**

KAM

LEISURE:

26th Jun - 1st July: ST's International City FAM Trip activity took place. 1 buyer from India representing ATD Journeys Pvt. Ltd. was nominated to participate. The buyer took part in the "Local Lifestyle in Swiss Cities" FAM which covered various experiences across Lugano, Bern and Lucerne.

27th July: Conducted a virtual training for Delhi-based DMC, Elevate Holidays. Presented Switzerland and its various touristic offerings, STS and its various services, and highlighted the latest travel conditions / guidelines for Switzerland. Total No. of Attendees = 6

July - Aug: Sales Calls in Mumbai with Key FIT & GIT TAs / TOs / Wholesalers - Veena World, Trip Navigator, Sanskruti Vacations, Aspen Vacations, Nivalink, Travel Arena, Beyond Borders, WOW Holidays, Zest Tours, Varun Worldwide, ATD Journeys Pvt. Ltd., MEITW, 3 Pisces Tours & Travels, Thomas Cook, SOTC, Harmony Tours, In-time Travels, Red Carpet Travels, Vinnayak Holidays, Kesari Tours, TBO, Riya Holidays, Musafir.com, TTC India, Touristers, etc.

SCIB:

- Sales calls in Chennai, to meet Corporate clients and MICE agencies (July)

- MILT Congress in Mumbai (July)

- Meeting with the Visa section in Delhi and Corporate client meetings (August)

- Sales calls to corporate clients & MICE agencies in Pune (August).



KMM

1. ABP News Trip – TV with celebrity couple

Focus – Switzerland as a multigeneration family destination.

-A TV trip with ABP News - one of the 3rd largest Hindi news channels in India was executed in July to showcase Switzerland as a perfect multigenerational family holiday destination.

-The trip featured TV celebrity– Arjun Bijlani & his family including his wife, 8-year-old son and 70 year old mother. Activities were planned keeping in mind the different age groups,

-The three destinations – Zurich, Interlaken, Lucerne, Swiss Travel System as well as SWISS were covered over 5 episodes of 15 min each.

-All partners were also showcased on social media platforms of the two celebrities, ABP news as well as ST handles . Social media content from the celebrity handles was also picked up organically by online news portals and gave us 360° coverage .

Total Media contacts:

Total TV Viewership – **105M**

Readership – **31M**

Social Media posts Likes– **3.3M**

Social Media posts video views– **25.3M**

Total: **48 Clips**

Total Contacts: **92'323'690**

2. Actor Shahid Kapoor & wife Mira Rajput's trip to Switzerland

Press notes were created for actor Shahid Kapoor and Mira Rajput talking about their family vacation in Switzerland. The couple pictures posted were used as content to disseminate it to media.

Total Media contacts:

Total: **57 Clips**

Total Contacts: **93'766'143**

Future Activities

KAM/LEISURE:



- Trainings in Delhi, Kolkata and Chandigarh
- Sales Calls across Mumbai, Delhi, Kolkata & Chandigarh
- Webinars 45 min webinars - Interlaken, STS & Zurich
- 15 min shared slot webinar on Aletsch Areana - MGB - Swissminiatur
- Switzerland Travel Mart - Luxury Edition 2022 takes place in Gstaad 6th - 9th Sept 2022. 1 luxury buyer from India (Aspen Vacations) will be representing India at the event.

SCIB:

- International wedding study trip in Switzerland.
- Sales call in Mumbai, Kolkata and Hyderabad

Campaign & Activation:

- STS Promo digital campaign
- Influencer & Media trip for Veggie-Day (Swisstainable project)
- Neeraj Chopra (Olympic medaillist) trip to Switzerland
- B2C Winter Event in Mumbai



2. Active Markets

JAPAN

Market Situation

Japan announced (unexpected) that the pre-departure test for triple-vaccinated travellers will no longer be necessary as of 7 September. At the same time the daily incoming quota will be raised from 30'000 to 50'000 pax. The quota is 50% of the daily arrivals in 2019. FIT travel to Japan is still not possible. Only travellers who book tours via a certified agent and who get a visa can enter Japan.

The ending of the PCR test was a very positive surprised for the travel industry – event if the main season is already over. First smaller groups have travelled to Switzerland and some tours are still scheduled to happen in September. Switzerland is selling well but Europe in general is extremely expensive due to high flight prices (+30%), limited capacity and a very weak Japanese Yen.

Best practice competitors

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Campaigning & Activation

- 06-08.07.2022: Hokkaido courtesy call with Swiss Ambassador. Exchange with Kuchan Town (sister city of St. Moritz) and Sapporo city mayor, Hokkaido governor.

- 05.07.2022: Consumer seminar by World Air Sea Travel and ST to support selling their Swiss products. 30 visitors.

- 15.07.2022: JATA 'Restart Overseas Campaign' to expose our presence through nationwide newspaper ad (7 mio contacts), digital signage to public at Tokyo station (58,000 contacts), Twitter campaign for 2 weeks (ca. 6,000 applicants) and ST video on official campaign website (PV30,000)

- 21-26 August 2022 Swiss Summer Camp Asia. Trail running camp in Switzerland with 5 Japanese runners participating,

- 22.07.2022: Visit of Hakone Railways and the local tourism organisation with the Swiss Ambassador to deepen the relationship (Hakone and RhB are sister railways)

KAM

- 21.07.2022: JATA webinar to present Swiss current tourism update and news from the partners. Participants 336 pax.

- 29 July: Top Client Event with travel agent Fellow Travel for their best customers. Event held for 50 pax at the Residence of the Ambassador of Switzerland.



KMM

Media Newsletter

- 2nd media newsletter in 2022 sent out 19 July to 665 media addresses integrated partner news, stories and ST global projects.

Media Result

TV:

- Asahi TV 'See the world by train' started to be aired from Zurich, then onto Chur Maienfeld, St. Moritz, Bernina Express, Galcier Express, Andermatt, Zermatt, Jungfrau Region. (between 8 Aug - 29 Nov)

Radio:

- BSS Radio 'Around the world' interview to Masayo Oshio, ST Tokyo about the news and summer highlights such as 100% Women world record, RhB world record attempt, Glacier Express, Bernina Express, hiking in Mürren/Schilthorn.

Magazine:

- Bi-Premium, luxury women's magazine reports about fun visit in Grindelwald First as the result of virtual media trip.

Online:

- BE-PAL, the outdoor online magazine reports about 100% Women world record media trip in Saas-Fee and Briethorn ascent.

- Randonnée, the outdoor online magazine reports about 100% Women world record media trip in Saas-Fee and Briethorn ascent.

SNS:

- Instagram posts by influencer @shewhoeasts about Geneva, Basel and Lugano as the result of Intl media trip 'Swiss Cities for Foodies'.

- Instagram posts by content creator @fumixparis about SWISS, Lucerne, Stanserhorn, Bürgenstock Resort as the result of content creator summit.

Interesting observations

-



2. Active Markets

KOREA

Market Situation

[Covid-19 Update]

The number of daily confirmed cases of COVID-19 is 138,812 as of 19 Aug and the average number of the last 7 days is 126,941. The statistic shows the numbers have increased over the last few weeks.

The Korean government has stayed the same with the social distancing policy from June 2021, The entry restriction for international travelers remained the same as before requiring the negative Covid test result with Antigen or PCR however, changed regulation has been applied for incoming travelers from overseas to take PCR within 24 hours from 72 hours on arrival from July. In local, mask-wearing is only mandatory in indoor spaces and public transportations.

[Economy and Politics]

Politics:

The new government with President Yoon Suk-yeol announced future directions for the diplomatic movement with North Korea and Japan. However, the announcement also generated some critical points of view from the public. The government will come up with more precise ways. Moreover, The Yoon government also plans to come up with a more comprehensive housing policy for young adults in September with a revision to the law expected to be made within the first half of next year.

Economy :

The Korean economy was forecasted and has continued to gradually improve due to recovery in employment and in close-contact services, however, there are concerns remained that higher inflation caused by external factors and the potential to drag on export recovery could slow down the economy according to the Finance Ministry. GDP Growth Rate in South Korea is expected to be 0.00 percent by the end of this quarter, according to Trading Economics global macro models and analysts' expectations. In the long-term, the GDP Growth Rate is projected to trend around 0.60 percent in 2023.

The government will make its utmost efforts to stabilize prices and people's livelihoods, address economic challenges and manage risks, and will take rapid actions to overcome low growth and create a virtuous cycle of growth and welfare.



[Tourism]

The outbound of Korean travel market is slowing down in the short term, but the long-term outlook remains positive. Accordingly, major travel agencies are continuing their sales promotion plans, and are working aggressively on long-term projects, especially planning for autumn and winter 2022, in collaboration with ST Korea. Massive M&As acquisition between OTAs and KAs are taking place and OTA-oriented market is expected to accelerate in the future.

Campaigning & Activation

Social Influencers' Trip to Switzerland to explore Summer Switzerland

- Period: 31 May – 8 June
- Partners : Zurich, LLR (Pilatus, Rigi), Jungfrau region, Interlaken, Schilthorn, Kandersteg, St. Moritz, St. Gallen, Appenzell, Zermatt
- No. of Influencers: 4 pax
- Followers: 607,000
- Contact: 30,495,171

KAM

STP Sales Promotion with STS and RE

- Period: June - July
- Partner KAs: Hyundai Dream Tour, NaeilTour, WAUG
- Online campaign through various sales platforms

Swiss Travel Academy 2022.

- Title: STA, AGAIN!
- 2nd seminar for 16th STA
- Date: July 6th, 2022
- Venue: Swiss Embassy in Seoul
- Participants: 16 pax incl. HanaTour, ModeTour, Hyecho, NaeilTour, etc.
- Introductions of themed travel
- Panoramic train tour
- Hiking suggestions



- Wellness – SPA, gourmet

KMM

Media newsletters to 650 journalists in July & August respectively

KR Swiss Friends 'Siyoung Lee' has visited Summer Switzerland and featured the nature of Switzerland and the variety of activities.

- Period: 14-26 June
- Partners: Saas-Fee, Jungfrau region, Schilthorn, LLR, Bern
- Contact: 52,109,500
- Coverage: 73 articles

Future Activities

STE Korea 2022
Period: Oct. 19-21
Venue: Four Seasons Hotel, Seoul
Participants: approx. 120 pax.
Program: One-to-One meeting, Workshop, Networking with major KAs

STA Study Trip to CH
- Period: Oct. 22-31
- Participants: 14 pax



2. Active Markets

NORDICS

Market Situation

While still strong, regional economic growth is set to nearly halve this year, following 2021's rebound. The ongoing tightening of labor markets and continued wage growth should more than offset pressures from tighter financial conditions and sky-high inflation rates. The evolution of housing markets, household debt and geopolitical tensions are factors to watch.

Inflation forecast to increase

Regional inflation skyrocketed to 7.8% in June (May: 6.8%). The acceleration came amid inflation rates hitting multi-decades highs in all countries across the region. Inflation is expected to stabilize in the coming months, although it is set to average its highest level since records began in 1999. Tighter financial conditions might not be able to offset higher energy prices.

Major issues with travel related service providers and in particular poor airport management, pilot strikes, recurrent faulty train lines have caused havoc to this summer's passenger flows.

Campaigning & Activation

SE-Connoisseur club, Newsletter

Ticino

DK-Berlingske, digital native

Ticino

SE-Vagabond, digital native

Panoramic train tours

KAM

Trade

STM City 26/6 - 01/07

2 pax participating at the trip to Lugano, Lucerne and Bern.



SE - Valais Afterwork,

Stockholm, August 29th

- 10 participants

- pre-meeting, 3 participants

SCIB

SCIB & partners event in Stockholm, August 26

KMM

SE-ÖtillÖ Swimrun Production Crew

8-20 July Engadin

SE-Anders Szalkai - Editor in Chief - Runner's World

7-10 July Valais

SE-Agnes Maltesdotter - Influencer

9-13 July Engadin

SE-Emrik Jansson - Photographer

11-15 July Davos

SE/NO-Women's outdoor Camp - Kajsa Larsson, Emma Svensson, Hildur Karlsson, Elisabeth Mathisen, Ebba Forsgren

20-24 July Engadin

SE-Happyride.se - Emma Harryson and Martin Olsson

25-28 July Engadin

SE-Jens Assur - Photographer

31-3 Aug Saas-Fee



SE-Daniel Breece - Bicycling

22-25 Aug Ticino

25-28 Aug Engadin

SE-Kenneth Gysing - Runnerworld

27-29 Engadin

29-2 Sep Valais

DK- MTBX Lasse Klausen, Lars Bachmann, MTBX & Velomore

22-25 Aug, Lenzerheide

Future Activities

Friflyt Film turné Oslo, October 6-7

Zermatt Meet-up by TO Konfido Stockholm, October 18

Sthlm Days, Stockholm, November 24-25



2. Active Markets

POLAND

Market Situation

Economy

The Polish economy suffered from inflation, supply chain issues and consequences of the Russian attack on Ukraine. Second quarter GDP came in at still impressive 5,3% year on year, but compared to the first quarter of 2022, it shrunk by 2,3%, putting a question mark behind the optimistic predictions for the whole year, that stood at ca. 5% until recently. Inflation remained very high in July at 15,6% year on year, industrial output and retail sales were down sharply. On the other hand, unemployment remains low (under 5%) and average wages in the private sector rose by ca. 13% year on year in June, but the number is going slightly down since the second quarter.

Politics

The second largest Polish river, Odra, has been heavily contaminated. First reports of dying fish came in months ago but have been largely ignored by the authorities, including the federal government. The specific reasons for the ecological catastrophe has not yet been found - most probably it has to do with substances dumped into the river by plants or factories in the south of Poland. The Odra over a stretch of hundreds of kilometers marks Poland's border with Germany, then flows into the Baltic Sea north of the city of Szczecin (Stettin).

The EU commission still has not greenlighted resuming the payments of European money to Poland. The funds had been blocked because of the Polish government's politicization of the Judicial System. Poland has made some small changes to satisfy the EU's demands, but Brussels still sees not enough evidence that an independent justice system is being restored.

Campaigning & Activation

- eGuide GTToS with NGTraveler and intensive promotion, [download here: issuu link](#), extra pages with influencers' recommendations and experiences after their trips in May-June, published end of June, promotion by NGT in print, online, SoMe end of June and July-August

Promotion:

- 2 pages, *National Geographic*, August magazine edition, on sale from middle of July, 28'000 copies, 406'000 readers

- 6 pages, August edition of *NG*, on sale middle of July, 28'000 copies, 395'000 readers

- Online campaign in SoMe promoting GTToS e-guide, 4 FB posts, 5 IG stories, 4 articles online, 12'300 UU. Widget campaign e-commerce with 812 clicks

Facebook posts reach 350'000 and IG stories reach 25'000



Video chat with reach of 5'400

- Trailrunning projects

Crossing Switzerland with Kingrunner ULTRA magazine, 1 pax, July, 20-27 July, Via Alpina *Crossing Switzerland* race, 350 km, SoMe activities on official magazine's channel and participant's channel

4 pages in July – August edition, with focus on *Crossing Switzerland* race - Via Alpina route. Topic – before the start, what is this race? 8'000 copies, 24'000 readers. Podcast promoting magazine

Aletsch, 2 pax, 7-12 August, *SwissAlps100km* race – participation, 1st place in his age category (50+) by our photographer/influencer Adam Brzoza (also in NG pool), program on spot – glacier visit, before during and after race content in his SoMe (Instagram), YouTube video planned after return

PUT and Engelberg, PUT - ultra running event around Rzeszów, southern Poland, ST brochures and materials distributed in packages for runners and also during event for visitors, 500 copies, special prize for 60km run winner: start in trail running *Cirque Series* in Engelberg, September. SoMe activities promoting event and prizes: pictures, movies

- eBook prepared by TV personality Kamila Kalinczak, free download, promoted via Kamila's and her friends' social media channels, supported by ST promotioni, incl. media trip *Kamila and Friends*

Kamila and friends - influencer trip in July, influencer project with tv persons, incl. promotion of the eguide by Kamila, 4 pax, 23-28 July, Lucerne and Lake Lucerne Region, (Pilatus, Titlis and Lucerne supported trip with tickets), SoMe activities (Facebook, Instagram), promotion of e-guide by Kamila, reach: 620'000

- Margaret and eGToS, festivals, July and August, recovery project

- eGToS online story campaign, with wp.pl, special service www.szwaicaria.wp.pl with articles, pictures and infographics. Input after the trip by e-car Mercedes as a partner of wp.pl. SoMe (Facebook and IG) promoting special service, 2 months campaign starting in August, 150'000 UU expected, recovery project

- GToS display campaign August

- Branding weekend with quality news site *wyborcza.pl*, 16-17 July



Summer, GToS, display campaign, reach over 1'600'000 views

4'300 clicks

- Online wyborcza.pl and wysokieobcasy.pl, after eGToS trip in June, online articles, 190'000 UU, 2 podcasts July & August with avg. 12'000 listeners

2x video with over 450'000 views, 4 NL posts, 290'000 subscribers

SoMe activities, 370'000, short stories in radio, 11'000'000

- Special for RhB, 8 pages advertorial, 14th July, monthly magazine for women *Wysokie Obcasy Extra* (WOE), Bernina and Glacier Express, Swisstainable topic, 106'000 copies, 564'000 readers

- ST NL for July and August

- ST SoMe activities. Paid campaign for market partners, posts promoted on our Facebook page, content delivered by partners, average monthly reach 800'000

KAM

- Summer business plans with Logostour, Bissole, Funclub, focus on promotion of GTToS, RhB products, rail experience

- Inviting the participants for the Middle European Workshop in Mürren, September

- City fam trips, July: Luxury, 1 pax, City and local vibe, 1 pax

KMM

- eGToS with wp.pl, with e-Mercedes, 2 pax, one of the biggest news portals in Poland, E-Mercedes trip on e-GToS, 5-10 July, Online SoMe (IG) activities by participants, content for our special service and articles after return

Recovery project

- Znaj Kraj, biking on 2 national routes, 2 pax, July, by the blogger Szymon Nitka, 9-19 July, 10 days biking trip to Switzerland, Jura Route and Lakes Route, Facebook and Instagram activities during and after return, promo posts in SoMe, blog posts after the trip



- Gazeta Wyborcza, 1 pax, Jungfrau Railways
- Zermatt, influencer Patryk Bieganski, 7-12 August, Zermatt hiking and photography, SoMe activities (Facebook, Instagram) during and after return, stories, reach so far 210'000
- Alpine Passes, influencer Jakub Perlikowski, 30.07 – 08.08, hiking and outdoor activities, research regarding spots for commercial photo trip in September, SoMe activities: posts and stories reach 220'000
- GTToS by Machines and Way of Blonde, 4 pax, August
- Photo Influencer Trip, Pilatus and Kandersteg region, 6 pax
- eGTtoS, by Europcar, two influencers Marcin and Adriana, August
- Int. Media Trip Outdoor and Photo, 20-24 June, 1 pax, *Wysokie Obcasy*, weekly women's magazine, SoMe activities: stories reach 20'000, post on Instagram, reach 8'000, online and print article in July
- Int. Media Trip, Swisstainable, 1 pax, August

Future Activities

- Trailrunner trip with ON and its brand ambassadors, 10 pax total, in September
- Luxury Workshop Gstaad 1 pax, September
- Madame Edith and Friends - ebike trip, 6 pax, September
- Winners trip with Gazeta Wyborcza, Lake Lucerne Region, 8 pax, September
- Middle European Workshop, Mürren, September
- Autumn photo project with influencers, Ticino, 6 pax, October
- Autumn campaign
- Winter business plans with zero Gravity, Allegra, Snow Show, Taxidi, Nekera
- Vegge Day promotion



2. Active Markets

RUSSIA

Market Situation

Economics

Experts predict a decline in Russia's GDP by 3.5% to 6% in 2022, and another 2%-4% down in 2023.

Outbound Travel

- As per the Border Guard Service of the Federal Security Service of the Russian Federation, in the first half of 2022, Russians made 2.3 million trips abroad for the purpose of tourism. This is 64% more than in the same six months of 2021, but 71% less than in the same period of 2019. The military special operation in Ukraine continues, air travel is still limited, and in this situation, there is no need to talk about a full-fledged outbound tourist flow. However, the top three leaders are not surprising, since these countries occupied the top lines of the rating in previous years: Turkey, Egypt, and the United Arab Emirates. The difference in the number of tourist trips between the first (1.171 million) and second (1.167 million) quarters of this year is only 0.4%, although due to the events in Ukraine, most flights abroad have been stopped since March. Russians went a lot in the CIS countries, many of them as individual travelers (not through tour operators).

- Russian Ruble exchange rate vs the key foreign currencies is favourable for travelling abroad: ca. RUB60=1CHF/Euro/USD (ca. RUB80 for 1CHF/USD and RUB 90 for 1Euro in January 2022)

- Most of the tourist travel to Europe over the Turkish and Arabian hubs Direct flights to Europe via Belgrade (Serbia) but with limited capacity and connections. Car and train connections to Latvia, Lithuania, Estonia and Belarus are existing and being used by individual travelers to fly out of Riga, Tallin and Vilnius and Minsk, but all subject to restrictions.

- Schengen Visa: Following European countries issue tourism visa for Russian citizens: Austria, Great Britain, Hungary, Germany, Greece, Spain, Italy, Cyprus, Portugal, Finland, France, Sweden, Switzerland

- There are 3 main reasons for travelling to Europe from Russia: luxury vacation, health and education (students and summer camp kids with parents occasionally). Agencies are working "on request" and with very short notice, no packages are applicable to the current situation.

- All key accounts in Russia survive on cost-saving mode (less staff and home office) and study sales opportunities in the CIS. Russian-speaking Incoming agencies in Switzerland work with demand from Russia, Ukraine and CIS.

- MICE clients concentrated on the inbound market (90% of all trips) and CIS countries: Armenia, Uzbekistan, Kazakhstan etc. Foreign companies, who still stay in the country, do business events without official branding.

Switzerland Tourism is monitoring the market. No marketing activities are carried out in Russia since end of February.

- Schengen Visa: The Embassy of Switzerland in Moscow, Visa section works normal as of May 2. Number of issued C/D visas tripled by July 2022.



- Current demand for CH: Health, Luxury and Education (incl. Summer camps).
- As per SFSO data 2022 volumes from Russia exceeded 2021 by 20% but are 73% down from 2019 levels (i. e. over 7'000 ONs in June 2022). Top destinations are Zurich and Geneva, St. Moritz, Zermatt & Bad Ragaz, Lausanne, Basel, Weggis, Saanen and Crans-Montana, Zug, Lugano and Paradiso Ennetbürgen and Montreux.

Best practice competitors

N/A



2. Active Markets

SOUTH EAST ASIA

Market Situation

Southeast Asia is recovering well, with 64% of 2019 level in H1/2022.

The champion is Singapore, achieving the period with +1% compared to pre-covid level. Malaysia is ranking second, ending up with -33% of 2019. Thailand and Indonesia's recovery is below 50%, a rather disappointing result explained by the fact that borders restrictions happened after the main travel peaks of, respectively, Songkran and Lebaran.

However, overall, the pace of recovery is steady and the prospects for H2/2022 are optimistic, despite limited visa and air supply and rising costs.

Campaigning & Activation

- Summer KOL trip "Tieweng" (TH)
- 100% women campaign with two ambassadors from Southeast Asia (TH, SG)
- Participation of one SG influencer to Content Creator Summit 2022
- STS Influencer Trip "Grand Train Tour of Switzerland"
- Content Distribution with summer partners on World Travel Magazine
- Online advertisement: 100% women advertisement campaign on online video streaming service VIU
- Online advertisement: SQ Navigator retargeting campaign
- Summer Public Event: 1st August celebration in Jakarta
- Out of home advertisement: 2 trains decorated on Bangkok BTS Skytrain
- Destination Wedding Reels on DWP SoMe channels

KAM

- SCIB TH: 350 ON from 1 client
- SCIB MY: 736 ON from 5 clients
- SCIB PH: 729 ON from 2 clients
- SCIB ID: 598 ON from 2 clients
- SCIB VN: 86 ON from 1 client
- SCIB ID/MY: Sales visits reunion



- SCIB TH: Handover Ceremony in Bangkok
- Trade webinar: Summer outdoors
- APW 2022 Reunion dinner (TH)
- Switzerland Travel Academy Southeast Asia campaign on TTG Asia
- ST/STS/RE Webinar for Thailand campaign
- ST/STS/RE Afternoon tea in Bangkok
- Meeting with Thai Travel Agents Association
- Wedding Planner site inspection trip

KMM

- Mixed Media Trip “Summer Outdoors”
- B2B media story “Summer Fun in Switzerland”
- Summer media briefing in Singapore
- Roger Federer exclusive interview in Business Times Singapore
- Autumn media briefing in Bangkok

Future Activities

September:

- 100% women sharing community event in Singapore
- Autumn media briefing at ILTM
- ST participation to ILTM Asia Pacific
- Singapore bus advertisement (autumn, Roger Federer)
- B2B media story Autumn
- Autumn mixed media trip
- Autumn mixed fam trip
- Market Development Tour
- Opening of Manila Antenna
- Visit Martin Nydegger (TH, SG)
- Visa workshop Thailand



2. Active Markets

SPAIN

Market Situation

Trips within the national territory increased by 102% during the first quarter of the year, while trips abroad increased by 395%, according to the Familitur survey published by the INE (National Statistics Institute).

If there is one element that testifies to the fact that Spaniards are travelling again after two years of restrictions due to the pandemic, it is the demand for suitcases, which has doubled since May last year, with an increase of 110%.

Best practice competitors

Campaing in Spain to promote the new movie «Bullet Train» integrating the highspeed trains OuiGo: <https://www.youtube.com/watch?v=hRoewxtHifc>

Campaigning & Activation

Exclusive activity to promote Basel through City Confidential, a creative online magazine for female urbanites with a community of over 180'000 members

The promotion included a microsite with a visual concept to discover Basel in a weekend, DEM and an advertorial - reach out 513'060 mktg. contacts

KAM

Second wave with various B2C trade campaigns with the big TO's in the market like CATAI, Viajes el Corte Ingles and Icarion. A sales oriented coopertaion Including the production of digital brochures, displays, microsities, emailings, newspapers ads, etc.

Sales oriented campaigns to push long weekends in Geneva, Basel and Zurich with Nautalia, Atrapalo and Logitravel

KMM

Mediatrips

Vanitatis.com to Zürich, 28.6-1.7



Viajes National Geographic to Bern, Mürren-Schilthorn & Eiger Express-Jungfrauoch, 5.-10.7

Descubrir.com and Radio Nacional de España to Fribourg Region, 11.-14.7

El País & Icon Magazine to Sils Engadin and Chur, 20.-26.7

Diario 20 Minutos Int. Mediatrip “Travelling a Swisustainable way” Zürich, Zermatt, Davos and Glacier Express, 13.-19.8

Top Coverage:

Traveler.es, online travel magazine, “48 horas en las montañas suizas”, 400’000 media contacts

Tendencias.com, online lifestyle magazine, “Un viaje redondo a la cuna del queso Appenzeller”, 75’000 media contacts

Libertaddigital.com, online daily newspaper, “Una gran exposición nos descubre la inesperada afinidad entre El Greco y Picasso”, 450’000 media contacts

Viajar.es, online travel magazine, “Nos subimos al “tren de la nostalgia” en el Brienz Rothorn Bahn”, 127’152 media contacts

Cronicaglobal.lespanol.com, online daily newspaper, “Blum, el podcast para descubrir Suiza en el que nada es lo que parece”, 175’000 media contacts

Canarias en Moto, online motorbike magazine, “Descubre Suiza siguiendo la estela de Zero y Alicia Sornosa”, 220’542 media contacts

Fem Turismo, travel radio program in Barcelona, “Interview with Cristofer Gallardo-Cities and STS”, 125’000 media contacts

ABC, daily newspaper, “Basilea, la ciudad con más museos que kilómetros cuadrados”, online & offline, 1’044’159 media contacts

La Razón, daily newspaper, “Ginebra, fascinación europea”, online & offline, 225’688 media contacts

Radio Libertad, travel radio program in Madrid, “Interview with Adrien Genier – Geneva”, 80’000 media contacts

Total: 2’922’541 media contacts

Interesting observations

Campaing in Spain to promote the new movie «Bullet Train» integrating the highspeed trains OuiGo: <https://www.youtube.com/watch?v=hRoewxtHifc>