



# Market Updates

## September/October 2022

### Editorial

Dear Partners,

We are (again) in times of uncertainty. War in Ukraine, very high inflation in most countries, an unclear 2023 in terms of the economy, and last but not least, a very strong Swiss franc.

Nevertheless, our tourism is on the path to recovery. For the months August and September, key markets like BeNeLux, France, Italy, Germany and USA performed better than in 2019. South East Asia is also in green territory with good perspectives.

A few weeks back, we opened our second Antenna (after Lisbon beginning of 2022) in Manilla. Others will follow very soon and are part of our strategy to test new markets.

September and October were very intense months in terms of activities. We had the ATWS Summit in Ticino, the GoPro Summit in Interlaken, workshops in Switzerland from different markets, just to name a few.

Now is also the occasion for me to say goodbye to you after (almost) 20 years in the Swiss tourism industry. It was a fantastic time and I thank all of you whom I had the chance to work with. See you soon hopefully !

Kind regards

Gilles Dind  
Head of Markets West



## 1. Priority Markets

### BENELUX

## Market Situation

### General situation

The months of September and October are expected to continue the positive trend in overnight stays this summer. In the summer months of July and August, an increase of 18.6% (compared to 2019) in overnight stays was achieved. In the Netherlands, even record levels of overnight stays were achieved for the months of July/August with an increase of 32% (compared to 2019). This is the highest value in the last 10 years for the Dutch market.

The very high inflation should possibly also be felt in the booking behaviour for the upcoming winter months. Inflation in the Netherlands is 14.5% in September and 12% in Belgium. Nevertheless, up to the present time in mid-October, this influence on travel and spending behaviour still seems to be limited. At least in our target group with higher purchasing power.

### Travel Outlook

This still intact spending behaviour is also confirmed in a survey on winter holidays just conducted by the Dutch Ski Association: 96% of the winter sports enthusiasts surveyed said they would not forego winter holidays in the coming winter. At most, savings will be made on the purchase of equipment. According to the study, possible COVID restrictions no longer seem to be a concern.

## Campaigning & Activation

### Meetings

#### Netherlands

- MICE & Business Travel dedicated eNewsletter Swisstainable.
- Meeting Magazine study trip Zurich and Davos eNewsletter and website.
- Meeting Magazine announcement networking event Swisstainable.
- EventBranche announcement networking event Swisstainable.
- Hight Profile announcement networking event Swisstainable.
- Conference Matters announcement networking event Swisstainable.

#### Belgium & Luxembourg:

- eNewsletter sent to SCIB database: Theme: Healthy meetings in Switzerland
- Boardroom Magazine (print): 2 pages about Bern: The Swiss capital of sustainability. 7'500ex
- Boardroom Magazine (print) : 2 pages about Zurich: Zurich a future-proof sustainability plan. 7'500ex
- MICE Magazine/Eventonline (online) Announcement Networking event Swisstainable



- Boardroom Magazine (online) Announcement Networking event Swistainable
- BBT online eNewsletter: Direct mailing: Reminder invitation Networking Evening to their database
- eNewsletter sent to SCIB Database. standalone about Lausanne-Montreux.

## Winter

### Belgium & Luxembourg:

- Reesen: Only travel magazine in Luxembourg, exclusive campaign with Made in Bern: print + digital sponsored content

## Summer / Autumn

### Belgium & Netherlands

- Swisstainable Autumn + STP-4-day-promotion. Digital Content Collaboration with DPG Media. Promoted through the online channels of 2 big newspapers. Content about Swisstainable late Summer / Autumn content and STP4
- Swisstainable Interactive Campaign with Honeyguides + Columbus Travel: Phase 3 with print, digital, webinar (Bern, Ticino, Valais).
- Content Creator Trips to Switzerland for creating some Itineraries for MyS.com which will be used in 2023 again
- Valais promotion Autumn brandend content promotion in print and online, on Food and outdoor related channels: ZIN, Saar, Food&Friends, Delicious and Sante. Print and online
- Basel City Brandend content promotion online

## KAM

### Meetings

#### Netherlands

- The Travel Club webinar 06/09.
- BTMF, fair organized by MICE & Business Travel 26/09.
- Networking Event Zilt op de Pier, 7 partners, 40 participants, theme Swisstainable and climate change, keynote speaker Gerrit Hiemstra 06/10.

#### Belgium

- MICE after-work event at the Faculty Club: 60 participants (29/09)
- Annual SCIB Networking evenings in Brussels:

18/10 for corporate and association meeting planners at Sparks Meeting : 12 partners, 30 guests, total 50 participants: Key-note speaker : Melanie Delaplanche: Empowering sustainable solutions for events

19/10 for PCO's and agencies at Kattebroek: 12 partners, 32 guests, 50 participants. Key-note



speaker: Bartel Dewulf: Sustainable catering for events.

## KMM

### Media Trips

#### *Group Media Trips:*

- Swisstainable Veggie Day: Reisachtig.nl:
- Rhb Worldrecord: Treinreiziger.nl & Reizenmetdetrein.nl:
- Lausanne: culture & gourmet (Benelux trip): Artsenkrant, Tageblatt, Het Nieuwsblad, Ron Reizen, Reisreporter.nl, ilovefoodwine.nl

#### *Individual Trips:*

#### Belgium & Luxembourg

- TV Production VTM 'Droomreis': Aletsch Arena
- TV & Radio RTBF 'Un Monde à part: GToS (Ti, LU, GRF)
- Pasar: Flims (Intersoc)
- RTL Lëtzebuerg: Arosa
- Grinta : gravel in Graubünden
- Vojomag: MTB in Aletsch Arena
- Pasar: Basel

#### Netherlands

- Margriet Magazine: Lavaux
- FietsActief: Graubünden
- Lonely Planet : Bern Region
- Nouveau: GTToS (LU & GRF)
- Reformatorisch Dagblad: Bernina Express

### Media Top Coverages

#### Belgium & Luxembourg

- Radio RTBF 'Un Monde à part': Nature Spa Molkebod Rigi
- Pasar: Ticino
- RTL Lëtzebuerg: 6x radio interview Arosa
- De Zondag: Ticino

#### Netherlands



- Kampioen: 4x winter Rhätische Bahn/STS
- Wandelmagazine: Basel

### **Meetings**

#### Netherlands

- MICE & Business Travel Swisstainable 2/1 page.
- Meeting Magazine 5/1 page plus cover studytrip Zurich and Davos.
- Conference Matters 1/1 page Swisstainable.

## Future Activities

### **Winter**

- Winter Snowplaza: Exklusive Key Partner Winter promo VWP (8 Wallis Destinationen) + B2C Raclette vent
- Winter Roularta promotion, print + digital, Podcast production: MiB + Valais
- Wintersportgids: exclusive winter promotion with Lucerne

### **Meetings**

#### Belgium

- Lufthansa Group MICE workshop in Brussels (November)
- IBTM
- Study trip to Davos with 8 agencies (December)
- BBT Speed date workshop with 4 Swiss partners ( December)

#### Netherlands

- IBTM 2022
- Winter Dutch Ski association excl Vaud
- Winter Bever Key Partner campaign ( Bern, Wallis and Graubunden)
- Winter KAM Studie trip with 11 travel agents Saas-Fee & Aletsch, Wallis



## 1. Priority Markets

### FRANCE

#### Market Situation

The French economy is expected to have a better-than-expected resilience phase until the end of 2022 before a sharp slowdown as of this winter. Despite persistent supply-side difficulties, GDP growth objective of 2.5% should still be achievable thanks to resilient demand and to the rebound in the services sector. Prices increased by 6.1 in the past 12 months.

The additional shock to European natural gas prices over the summer, coupled with Russia's shutdown of gas deliveries to Europe will have an impact on household consumption, but also on business activity. (Source: Banque-France.fr)

In the latest study by Atout France (sept 2022) 36% of respondents said they had not left during the summer vacations or had considered not doing so. For 37% of them, the lack of financial means explained this observation. However, booking numbers for the fall holiday (Toussaint) are only 3% behind compared to 2019.

#### Campaigning & Activation

##### GRAND TRAIN TOUR OF SWITZERLAND :

-Campagne avec le Media AR Magazine pour le compte de l'Association du Grand Train Tour of Switzerland. Article de 15 pages + 2 pages de publicités (Victorinox et GTToS). Sortie mis septembre en kiosque (25'000 exemplaires print 25'000 UVPM et 4000 téléchargement Kiosque Air France).

4 Podcast de 15 à 20 min chacun. Diffusion entre octobre et décembre 2022.

##### SCIB :

- 11 articles de blog publiés, 21'876 pages vues sur la période sur l'ensemble du blog (il y encore 2 articles prévus et il manque le lectorat de la dernière semaine d'octobre).

- e-news " Crans-Montana : la destination idéale pour votre événement à la montagne." envoyée à 2'334 contacts --> taux d'ouverture : 28.03%, ouvertures uniques : 489, taux de clic : 2.69%

- Webinaire "Pour un séminaire montagne à 5h de Paris"

14 participants en live et 57 qui n'étaient pas disponibles mais souhaitaient les informations.

##### AUTOMNE :

- KP Tessin : création d'une landing page hébergé sur MyS.com. mise en avant des 10 activités à faire au Tessin à travers le regard de TravelMeHappy (influenceur parti en septembre). Médiatisation via du native et du social. 40'000 clics, 20'000 visites.

- KP Valais : campagne sur l'automne en Valais. En print 2x3 pages de publiprédactionnel dans Vivre Paris et Vivre Lyon sur les n° automne. En digital campagne de visibilité et trafic avec du display, native et social display. 262.5K lecteurs, 3M impressions, 56K clics.

##### SWISS CITIES :



- KP Berne / Télérama Sortir : 1 publiereportage dans télérama sortir sur l'automne culturel à Berne. complété avec du native (outbrain) et du social display sur le monde. 681K lecteurs - 2.3M impressions - 3.8K clics.

- KP Zurich / Madame Figaro : mise en ligne d'un article sur le site de madamefigaro sur la ville de Zurich. 1.1M reach, 5K visites garanties.

AMOS :

- Dossier digital dédié aux musées AMOS en partenariat avec beauxarts.com. 1 article par musée. Médiatisation via des push éditoriaux, du Social Media et du display. 18'000 visites garanties.

SWISSTAINABLE :

- Marie Claire et Marie Claire Maison print : encartage d'un mini magazine de 12 pages "Les Carnets swisstainable" (carnet de voyage d'une journaliste + une influenceuse / voyage effectué en juin 22). Budget Recovery. Mise en avant de du voyage durable. Encartage partiel sur Paris, Rhône-Alpes et Grand Est. 50'000 exemplaires pour 125'000 lectrices estimées.

- marieclaie.fr : réalisation d'un espace dédié "la Suisse, green et grandiose" en complément du print. Mise en avant du voyage durable à travers une influenceuse et un journaliste (voyage en juin). Texte + vidéos. Médiatisation via les réseaux sociaux, du native et push éditoriaux. 80'000 visites garanties.

100%WOMEN :

- Marie Claire print : double page sur le voyage "100% femmes" dans Marie-Claire. Edition septembre. 310'108 exemplaires - 1'300'333 lectrices.

RUN THE SWISS CITIES :

- Partenariat avec la plateforme de running Running Heroes (communauté de 850K runner). Mise en ligne de 2 articles, chacun mettant en avant 2 villes avec un focus itinéraire (5-10ou 15K de running). Mise en place d'un challenge running pour gagner un we à Bâle. 550K reach - 51K engagement.

## KAM

Salon ELUCEO (Comité d'entreprise). Loge ST - STS pour la mise en avant d'offres de voyage pour les entreprises et leur salariés (loisirs). 90 contacts rencontrés pour cette première édition.

Visites de Tour operators et professionnels du voyage du Grand Est (Formitour et Interhome)

Reactivation et prise de contacts avec des agences incoming (Rail Tour et RS tour.

SCIB :

- "8ème Cocktail-Mix Challenge" - Soirée Networking pour agences et quelques corpos avec un Workshop dans un premier temps pour rencontrer nos 7 destinations présentes suivi d'un atelier de mixologie et un challenge en équipes pour les agences.

Destinations partenaires présentes: Genève, Bâle représentée par Dorint Resorts, Lausanne, Davos, Villars-Les Diablerets, Andermatt et Crans-Montana + Sandoz Hotels Foundation --> 28 participants au workshop et 35 au challenge, 10 annulations le jour J. Très bonne ambiance, clients arrivés un peu tard pour le Workshop mais très satisfaits de l'événement, intéressés par les destinations, destinations très satisfaites également.

- Eductour Lausanne & Montreux sur 3 jours avec 7 agences, très bons retours



## KMM

Voyage de presse de groupe organisé avec les Villes suisses (Genève, Lausanne et Berne), voyage de suivi de l'évènement de networking RP de juin 2022 à Paris avec les Swiss Cities.

Divers voyages de presse individuels ainsi que tournages pour des Key Medias tels que TF1, le Figaro, Le Point etc...

Newsletters de rentrée (automnales) en septembre et Newsletter envoi du dossier de presse hiver en octobre à plus de 600 contacts presse. Mise en avant de Nature Spa, Run the Swiss Cities et Swisustainable.

Tour des rédactions du Grand Est et de la PQR (l'Est Republicain et l'Alsace)

## Future Activities

KMM:

Event media à Paris en décembre

Visite de journalistes en Région Paca en novembre

KAM:

Evenement B2C à Nantes avec l'agence Discovery Train en décembre (70 pax)

Visite de tour operators en région PACA





## 1. Priority Markets

### GCC

#### Market Situation

- The GCCs are still booming mainly due to the high oil and gas prices. In the UAE an additional influx of Russians from Europe/Switzerland and Russia result in an extreme increase in prices on the property market which is mainly under the control of locals. More income for locals means more demand for travel especially towards Europe and Switzerland. Still the visa departments of our embassies can't cope with the demand. The waiting lists for visa appointments is still more than 2 months in the UAE and still hardly possible in Kuwait.

#### Best practice competitors

- Competitors invest heavily into the market. Many participated in TFest an expensive private luxury hosted buyer event over several days with intense leisure part.

#### Campaigning & Activation

- OOH campaign in KSA and UAE: I need a roadtrip - I need Switzerland from 1JUN-20OCT. Total contacts: 244.07 Mio

- Instashop.com campaign. Date: 8-31OCT. Whoever buys on the Organic section and puts Swisustainable while checking out, can win a trip to Switzerland. Contacts: Around 2Mio

- Health STM: 12 GCC Health delegates participated at STM Health in Bad Ragaz from 11-17 SEP. Post convention tour to 6 clinics in all parts of Switzerland.

- Health Mission, KSA 22-26 OCT. 9 Swiss Clinics participating. Around 15 meetings with authorities, health insurances and hospitals. Press conference with 25 medias. Press Release.

- KAM STS Promotion: Excellence Talk

#### KAM

- GCC workshop with 68 GCC Buyer and 82 Swiss partner in Montreux from 18-20 SEP. More than 1000 meetings conducted. 11 pre- and posttours to all Swiss partner regions.

- KAM Travel Counsellors Workshop: 13SEP. 22 meetings with independent Travel Counsellors

#### KMM

- Sayidati Health Editorials (most prominent female Magazine in KSA). Full double page in SEP and OCT. Contacts: 750'000



- Gulf Business: Editorial about Swisustainable. 26OCT: Contacts 77'000

## Future Activities

- 1NOV22-15JAN23 Club Suisse at Football World Cup in Qatar. Participation with 3 elements at the Club Suisse: IneedSwitzerland Wall, Connection Wall, Swisustainable Wall. 2 events on 16 and 23NOV.
- Participation and Sponsoring of FIS Races and Emirati Championships (Freestyle, Snowboard, Alpine, People of determination) at Ski Dubai
- Visa Workshops together with SEM and travel agents to improve visa situation in KSA and UAE. 28NOV-1DEC
- DEC. Winter Influencer Trip: Crans-Montana

## Interesting observations

- Competitors invest heavily into the market. Many participated in TFest an expensive private luxury hosted buyer event over several days with intense leisure part.



## 1. Priority Markets

### GERMANY

## Market Situation

### Trade – Reisbüroumsätze

Der fakturierte Gesamtumsatz der im Reisebürospiegel des Backoffice-Dienstleisters Tats erfassten Reisebüros liegt im Oktober um 18 Prozent unter dem Vergleichsmonat des Vorkrisenjahres. Kumuliert liegen die Umsätze von Januar bis Oktober um ein Viertel unter denen von 2019. Der abgerechnete touristische Umsatz weist im Oktober im Vergleich zu 2019 ein Minus von 15 Prozent auf. Der Umsatz im Flugverkehr verzeichnet ein Minus von 23 Prozent. Die sonstigen Umsätze liegen um fünf Prozent unter denen des Vorkrisenjahres. Kumuliert betrachtet steht der gesamte fakturierte Reisebüroumsatz in den Monaten von Januar bis Oktober im Vergleich zu 2019 um 25 Prozent darunter. Auch der Auftragseingang entwickelte sich im Oktober schwach. Laut Tats lag er im Monatsvergleich zu 2021 bei minus 15 Prozent. Tats ist ein Backoffice-Dienstleister der Tourismusbranche. Für den monatlichen Reisebürospiegel werden die Buchungs- und Buchhaltungsdaten von rund 2.500 angeschlossenen Reisebüros erfasst.

### Yougov/Tourlane Umfragen zur Reiselust der Deutschen und Rezessionsängsten

Reiseanbieter Tourlane hat mit Yougov eine Umfrage gestartet (News vom September 2022), um die Reisetrends der Deutschen für 2023 abzufragen. Dabei zeigt sich eine grosse Reiselust, denn 92 Prozent geben an, dass sie im kommenden Jahr verreisen wollen. Die Mehrheit will raus in die Natur oder zieht es an die Strände, so Tourlane. Laut Umfrage stehen Flexibilität und Sicherheit bei der Wahl des Reiseveranstalters ganz oben auf der Liste der meisten Befragten. Rund 40 Prozent der Befragten entscheiden sich laut Umfrage aufgrund der Pandemie für flexible Buchungsbedingungen. Jedoch hat die Mehrheit (78%) bisher noch keine Reise für 2023 gebucht. Eine Reise in die Natur (54%) oder an die Strände Europas (22%) ist für die meisten am attraktivsten. Den deutlichsten Unterschied zwischen den Altersgruppen gebe es bei den Reisegewohnheiten seit der Pandemie. Nachhaltiges Reisen und eine gute Internetverbindung sind Befragten im Alter von 18 bis 24 Jahren fast doppelt so wichtig wie anderen Altersgruppen. An der Umfrage von Yougov im Auftrag von Tourlane nahmen 1.056 Personen im Alter ab 18 Jahren teil.

Eine aktuelle Umfrage von Yougov zeichnet allerdings ein anderes Bild: Fast drei Viertel der Menschen in Deutschland machten sich Sorgen wegen eines möglichen Wirtschaftseinbruchs und beabsichtigen, ihr Kaufverhalten anzupassen, so die Umfrage des Meinungsforschungsinstituts YouGov unter 2035 Menschen im Auftrag der Unternehmensberatung Simon-Kucher & Partners. Einschränkungen kann sich die Mehrheit vor allem beim Kauf neuer Kleidung (58 Prozent) sowie bei Ausgaben für Ferien (55 Prozent) und Freizeitaktivitäten (52 Prozent) vorstellen. Auch ins Restaurant würde fast jeder Zweite (49 Prozent) nach eigenem Bekunden seltener gehen. Neben Rezessionsängsten lähmt auch die hohe Inflation den Konsum. Im Oktober lagen die Verbraucherpreise in Deutschland laut vorläufigen amtlichen Angaben um 10,4 Prozent über dem Niveau des Vorjahresmonats. Das ist der höchste Wert seit etwa 70 Jahren. In der YouGov-Umfrage gaben 60 Prozent der Befragten an, angesichts der steigenden Preise ihren Konsum reduzieren zu wollen.

### Wirtschaft

Die deutsche Wirtschaft befindet sich laut den führenden Wirtschaftsforschungsinstituten auf direktem Kurs in eine Rezession. Das deutsche Bruttoinlandsprodukt (BIP) wird im zu Ende gehenden Sommerquartal, im Herbst und Anfang 2023 jeweils schrumpfen. Das geht aus dem Herbstgutachten der Forscher mit dem Titel "Energiekrise: Inflation, Rezession, Wohlstandsverlust" hervor. Demzufolge dürfte das BIP im dritten Quartal um 0,2 Prozent sinken, Ende 2022 um 0,6 Prozent und im ersten Vierteljahr 2023 um 0,4 Prozent. Ab nächstem Frühjahr dürfte die Wirtschaft dann wieder leicht



zulegen. Für das Gesamtjahr 2022 prognostizieren sie nur noch ein kleines Wachstum von 1,4 Prozent. Für 2023 sagen sie einen Rückgang des Bruttoinlandsprodukts um 0,4 Prozent vorher, für das Jahr 2024 einen Anstieg um 1,9 Prozent.

## Campaigning & Activation

**Winterthur x Weltkunst:** Medienkooperation mit einem der führenden Kunst-Magazine Deutschlands. Im September wurde Winterthur auf den digitalen Kanälen von Weltkunst als Kunst- und Kulturperle der Schweiz vorgestellt. Im Oktober folgt die Vorstellung der Stadt aus der Perspektive des Fotografen Florian Albrecht-Schoeck.

**Städte Kampagne 1:** Online Advertorials über die 9 grössten Tourismusstädte der Schweiz wurden geschaltet in den Magazinen Cosmopolitan und Mönnersache. Insgesamt wurden die Artikel 62'000 Mal gelesen.

**Städte Kampagne 2:** In den Magazinen Runner's World, Women's & Men's Health wurden Advertorials zum Thema "Running Swiss Cities" geschaltet. Parallel wurden im Berliner Sender "Radio Eins" Spots ausgestrahlt. Jeweils Ende September für 2 Wochen.

**Städte Kampagne:** 3 Micro-Influencer (<5'000 Follower) haben im September originellen Content aus Zürich, Luzern und Bern erstellt. Das Video- und Fotomaterial wurde in einer Social Media Kampagne vom 28.09. - 19.10.2022 genutzt um für eine Städtereise in die 9 „A-Städte“ zu inspirieren.

**Swisstainable Recovery Kampagne:** Mit dem seit 2001 bestehenden grössten europäischen Outdoor-Filmfestival European Outdoor Film Tour (E.O.F.T.) wird Swisstainable – das Nachhaltigkeitsprogramm des Schweizer Tourismus- an die Gäste des Festivals ausgespielt. Ziel ist, die Schweiz als Nachhaltigkeits-Leader und dessen Bestrebungen bei einem breiten Publikum zu präsentieren.

**Digital Wallis Kampagne mit der Zeit:** Zusammen mit der ZEIT-Studios wurden 7 Content-Cards Anzeigen für das Wallis erstellt. Diese machen bildreich und mit eingängigem Text in geeigneten Contentumfeldern Lust auf einen Winterurlaub im Wallis. Die Massnahme wird im zeitonline-Netzwerk ausgespielt und sowohl regional wie auch soziodemographisch auf Schweiz-Zielgruppen getargeted.

**SportScheck Winterkampagne:** Sechswöchige Winterkampagne vom 17.10. - 25.11.22: 360 Grad Marketingkampagne mit Fokus auf den Online Kanälen sowie POS mit einem der grössten Sportartikelhändler Deutschlands SportScheck. Integration der Schweizer Partnerregionen Arosa Lenzerheide, Davos Klosters und Engadin.

**DB-Herbstkampagne:** 17.10. - 25.11.22. Integration Schweiz in die digitale Kampagne „Sparpreis Europa“ der Deutschen Bahn mit der Botschaft der direkten und bequemen Anreise mit der Bahn in die Urlaubsregionen der Schweiz.

## KAM

**SCIB - Sales Call „Vierwaldstättersee“:** Das Switzerland Convention & Incentive Bureau besuchte gemeinsam mit dem Luzern Convention Bureau, Pilatus Bahnen sowie Andermatt 20 MICE Kunden in München, Heidelberg sowie Frankfurt (12.09. – 15.09.2022), um über die Destinationen und die Schweiz als MICE-Land zu inspirieren.

**SCIB - BlachReportDialog 2022:** In diesem Jahr fand der BlachReportDialog mit dem gleichnamigen Fachmagazin vom 16.09.2019 - 18.09.2022 in Kooperation mit dem Davoser Convention Bureau statt. Es haben insgesamt sieben Geschäftsführer und Top Entscheider aus der Deutschen Agenturwelt bei



der Reise nach Davos teilgenommen.

**SCIB - Sales Call „Zürich & Davos“:** Das Switzerland Convention & Incentive Bureau besuchte gemeinsam mit den Regionen Zürich und Davos verschiedene MICE Agenturen und Corporate Kunden in Köln, Frankfurt sowie Wiesbaden (10.10. – 13.10.2022). Es wurden insgesamt 25 Personen über MICE Möglichkeiten in der Schweiz und insbesondere in Zürich und Davos informiert.

**SCIB - Sales Call „Engadin St. Moritz“:** Das Switzerland Convention & Incentive Bureau besuchte gemeinsam mit Engadin St. Moritz verschiedene Agenturen und Corporate Kunden in Stuttgart, München sowie Garmisch-Partenkirchen (24.10. – 27.10.2022).

**Webinare und Newsletter** für die Trade Kontakte mit je 50 Teilnehmern an zwei Webinaren

**Meet & Greet Tour Tessin:** 6 Termine mit Touroperatoren und 1 Event in München mit 20 Expedienten (14. - 16.09.2022)

**FamTrip** vom 18.-22. Oktober 2022, 9 Gewinner vom 24h Berlin Anlass in Luzern, Interlaken, Jungfrau Region und Wallis (GGB + Brig)

**Willy Scharnow-Stiftung für Touristik:** Zwei Studienreisen mit jeweils 12 Reisebüro-VertreterInnen ins Wallis (8. - 11.9.22) und in die Jungfrau Region (29.9. - 2.10.22)

## KMM

**Winterlaunch:** Am 20. Oktober haben wir den Schweizer Winter lanciert. Auf einer Veranstaltung in München haben wir 41 Teilnehmenden aus den Bereichen Medien und Trade über die winterlichen Neuigkeiten informiert, zusammen mit den Regionenpartner Bern, Graubünden, Tessin und Wallis.

**Mediendinner:** Am 13. und 20. September fanden zwei Mediendinner im exklusiven Rahmen zum Thema "Herbst" statt. Partnerregionen waren Tessin (Stuttgart) und Graubünden (München).

Am 11. Oktober ging der **neue Medienreisekatalog "Winter"** online. Über 800 Top Medienschaffende haben die Einladung zu Recherchereisen erhalten.

**Medienreisen:** Im September und Oktober wurden insgesamt 36 individuelle Medienreisen in die Schweiz organisiert.

## Future Activities

**Top Spot Award of Switzerland - Winter Edition:** Fortsetzung der erfolgreichen Top Spot Award of Switzerland Kampagne aus dem Herbst 2021. Dieses Mal international mit den Märkten Frankreich, UK und BeNeLux. Filmemacher reisen vom 4. - 11. Dezember 2022 ins Wallis (Crans-Montana) mit dem Ziel in 100 Stunden den besten 100 Sekunden Film aus dem Schweizer Winter zu erstellen. Anschliessende Digitalkampagne mit dem neu generierten Winter Video-Content.

**Digitale Winterkampagne „Skiurlaub 2.0“:** In einer Digitalkampagne fokussieren wir auf swisstainable Erlebnisse auf und neben der Piste. Im Dezember reisen Content Creator nach Graubünden und ins Berner Oberland, entdecken die swisstainable Seiten der Destinationen und erstellen Content für die anschliessende Digitalkampagne mit Ausspielung Dezember 22 / Januar 23.

**Städte-Event:** In Berlin findet am 10. November ein Medienevent statt, mit Vertretern von 7 Schweizer Städten.

**Schokoladen-Medienreise:** Zum ersten Mal findet eine Gruppenmedienreise zum Thema "Schokolade" statt, vom 16. - 20. November. Sie wird gemeinsam mit dem Verband ChocoSuisse durchgeführt.



**Wintermärchen mit Luca Hänni und Christina Luft:** Das Deutsch-Schweizerische Paar, bekannt unter anderem aus DSDS und Let's Dance, reist vom 4. - 7. Dezember in die Jungfrau Region und erlebt dort eine romantische sowie aktive gemeinsame Zeit. Begleitung durch einen Video- und Fotografen mit anschließender Social Media Kampagne.



## 1. Priority Markets

# GREATER CHINA

## Market Situation

- HKG: from 26Sep2022, quarantine reduced to 0+3, 48hrs pre-departure PCR Test cancelled, just needed 24hrs RAT negative proof.

SCIB:

- Facilitating the exchange of international business personnel has finally been a little loosened since 25 Oct 2022.

## Campaigning & Activation

- Euro Travel Mart Shanghai Sep 9-11, promotion Switzerland together with Kambly and Appenzell Bier. 200+ participants including VIP, club members and public. B-C seminar on Sep 10 during Euro Travel Mart.

- Culture Destination Switzerland: Livestreaming Luzern 08Sep, participants:

- Culture Destination Switzerland: Livesreaming Ticino 28Sep, participants

- Culture Destination Switzerland: Livestreaming Zurich: 13Oct

- Culture Destination Switzerland: Livestreaming Geneva: 27Oct

- Culture Destination Switzerland: NFT postcards

- Culture Destination Switzerland: Art Roadshow Beijing 25Oct at Guomao SNNA

## KAM

- Trade Webinar Sep: STS / VAUD / Crans-Montana

- Trade workshop on Sep 11 in Euro Travel Mart Shanghai

- ITB Shanghai Sep 21

- Trade reunion dinner together with local rep Sep 20

- Qtravel Shanghai family product offline event support Oct 6

- ITB Shanghai trade livestreaming Shipinhao 20Sep

- Swiss Embassy Movie day trade invitations

SCIB:

- SCIB Sales call tour Shanghai (6-9 Sep) and Beijing(16 Sep);



- Livestream support for Usana Babycare on 27 Sep.

## KMM

- Autumn Launch in Beijing on 6th September, 67 media representatives + 5 VIP attended.
- Autumn Launch in Shanghai on 8th September, 32 media representatives + 3 VIP attended.
- Media trip hiking influencer in St.Moritz
- Autumn Xiaohongshu campaign online
- Interview by Mangofun for GtoS and Swisstainable
- Interview by World Traveler
- Interview by Eastday.com
- Interview by Shanghai daily
- Interview by Today Impression

## Future Activities

- winter launch and promotion
  - art roadshow Chengdu, Hongkong
  - Culture Destination Switzerland livestreaming Vaud & Basel
  - House of Switzerland SO SWISS in Shanghai 18 - 27Nov.
  - STE virtual meetings and offline local rep. gathering
- SCIB:
- Usana Babycare visit and shooting project in CH in Nov;
  - Asia trophy delegation (Dec);
  - Webinar Training Geneva in Dec;
  - MICE NL distributed in December;
  - MICE Gathering tbc.





## 1. Priority Markets

### ITALY

#### Market Situation

The **2022 Italian general election** was a snap election held in Italy on 25 September 2022. After the fall of the Draghi government, which led to a parliamentary impasse, President Sergio Mattarella dissolved the parliament on 21 July, and called for new elections. Regional elections in Sicily were held on the same day. The results of the general election showed the centre-right coalition led by Giorgia Meloni's Brothers of Italy, a radical-right political party with neo-fascist roots,<sup>1</sup> winning an absolute majority of seats in the Italian Parliament. Meloni was appointed Prime Minister of Italy on 22 October, becoming the first woman to hold that position

The Italian election results seem to have gone mostly unnoticed in the currency market. This is partly due to the predictability of the outcome, but may also denote how markets are giving Meloni the benefit of the doubt after a campaign where she firmly reiterated her intention to respect fiscal rules and maintain Italy's foreign stance unchanged.

Quite crucially, like for government bonds (BTPs), the euro has bigger concerns to deal with – Russia-Ukraine developments and the energy crisis above all – and is now also feeling some spill-over effect from the meltdown in the GBP market over the past two sessions.

#### Campaigning & Activation

##### **Diavolezza – organic and promoted campaign on Facebook @myswitzerlandit**

Period: 1.7-30.9.2022

What: organic and promoted post campaign for Diavolezza to promote the special summer group ticket price

Results organic post: Reach: 9'400 / Engagement: 77

Results promoted post: 1.870.000 impressions / 9'800 click

Partner involved: Upper Engadin

##### **Influencer Trip Luxury Roberta Ruiu**

Period: 24.8-2.9.2022

What: Influencer Trip of Roberta Ruiu to luxury hotels in Switzerland

Rental car provided by Europcar

Contacts: 1'020'000

Partners involved: Bürgenstock Hotels & Alpine Spa, Crans-Montana Tourism & Convention, Gstaad Palace, Guarda Golf Hotel & Residences, The Chedi Andermatt, 7132 Hotel

##### **Influencer Trip Chiara Ferragni & friends at Bürgenstock**

Dates: 2-4.9.2022



What: Support for a 3-day-stay at Bürgenstock for Star Influencer Chiara Ferragni (Followers: 28M) with first class influencers

Participants: 8 people

Contacts: 96'915'000

Partners involved: Bürgenstock Hotels & Alpine Spa

### **Influencer Trip Kulturherbst Bern**

Date: 27-29.9.2022

What: Influencer Trip to promote Kulturherbst in Bern, Kandersteg and Trenino Verde delle Alpi

Influencer: Tatiana Biggi

Partners involved: BLS, Made In Bern, TALK

### **Meeting with Martin Nydegger and swiss institutions**

Date: 15.9.2022

What: Visit of CEO ST in Rome, event in cooperation with Swiss Embassy, organized at swiss ambassador's residence (Monika Schmutz)

Media networking event with 3 top Italian media and 1 swiss media NZZ

Realization of 2 radio interviews

### **Distribution Swiss Bike Hotels with 4BIKE**

Date: 15.9.2022

What: Distribution of Swiss Bike Hotels with magazine 4BIKE and advertorial about biking in Switzerland

Circulation: 4'300 copies

Area: Lombardia

### **Lunch KAM with Bern and BLS in Torino**

Date: 22.9.2022

What: Presentation and lunch for travel agents and tour operators

Where: Otium Pea Club in Torino

Participants: 25 people

Launch of 10 itineraries in Switzerland by Fiavet Piemonte



Partners involved: BLS, Bern Welcome

### **Event in Florence with the archistar Mateus**

What: Event with Lausanne Tourisme and the order of architects

Focus: Platform 10 and architecture in Switzerland

Distribution of brochures Cities and Museum of Switzerland

Special guest: The archistar Manuel Mateus

Partner involved: Lausanne Tourisme

### **Autumn digital promotion panoramic trains**

Period: 3-30.10.2022

Content, display, native and social advertising

More than 10 M contacts reached at the end of October and 79'000 sessions obtained

Partners: Bernina Express and BLS Trenino Verde delle Alpi

### **Influencer Trip BLS**

Dates: 17-19.10.2022

What: Influencer trip, weekendieri (Laura Zampetti 121K followers)

Contents: 1 post, 1 reel, stories and 1 article on her blog – promocode

Partner involved: BLS

### **Dinner with Swiss Partners**

Date: 27.9.2022

What: Dinner with Swiss Ambassador Monika Schmutz, Swiss Consul Ugo Patroni Griffi, President of Festival del Cinema di Locarno Marco Solari and Euro deputy Silvia Costa

### **Team Building Hearst Digital in Ticino**

Date: 4.10.2022

What: Daily team building event at Monte Generoso

Program: Train to Monte Generoso, Ecstatic Dance and lunch at Fiore di Pietra

Participants: 52 digital content creators



ST Italy in collaboration with Mendrisiotto Turismo

**Shooting with Michelle Hunziker for winter campaign PROMOSVIZZERA**

Date: 12.10.2022

What: Shooting in Station Centrale Milano and in Studio with Michelle Hunziker

Production of winter campaign PROMOSVIZZERA in collaboration with Trenitalia/STS

Partners involved: Bern, Basel, Lucerne, Lausanne, Montreux, STS, Trenitalia

**KAM**

**Webinar Bern held by Travel Quotidiano**

Date: 29.9.2022

Partners: Berne City, Interlaken, Jungfrauregion, Made in Berne, TALK

**Virtual sales class Travel Breaking News**

Date: 5.10.2022

What: Travel open Village virtual

Focus: MySwitzerland Pro, Grand Train Tour and Cities

**TTG Rimini Fair**

Dates: 12-14.10.2022

What: Presence and distribution material in Adrastea Viaggi stand and dinner with partners

Launch of partnership cooperation with Assoviaggi Association (1'300 travel agents and to's in Italy)

**KMM**

**Media results**

- 7,2 million
- 19 journalists invited to Switzerland
- 1 media newsletter about Swisstainable Veggie Day.

**Group media trip**

- Trip in Geneve (20-24.09.2022) discovering culture highlights; Participants: 3 journalists.
- Trip in Basel (27-28.10.2022) for Beyeler anniversary; Participants: 6 journalists.



### Top coverage

- Reportage (8 pp.) about Gruyere on travel monthly magazine Bell'Europa (readers: 337'000; publication date: 01.09)
- Article (2 p.) about Vevey on weekly magazine Famiglia Cristiana (readers: 1,2 million; publication date: 20.10)
- Reportage (7 pp.) about Basel on Lonely Planet Magazine (readers: 100'000; publication date: 01.09)
- Article (1 p.) about RHB World Record (55'000 weekly visits ; publication date: 06.10)

### Future Activities

- Big winter launch & promotion with a Swiss Winter Village in Milan from November 7 - 27:
- Media event on opening Nov. 7 with testimonials Michelle Hunziker, Giorgio Rocca, Bernhard Russi and all partners -> big media reach
  - Synthetic ski slope for beginners, kids, young generation to push passion for winter sport
  - Winter Village with igloos and chalets for mountain destinations and cities campaign in collaboration with Trenitalia & STS
- "Promosvizzera" /Christmas markets special campaign with Michelle H. in collaboration with Trenitalia to promote a special promo to visit the Christmas markets in the Swiss cities:
- Digital campaign with promovideo with MH, pushed with media partnerships, on all channels of trenitalia, OOH campaign in Milan, etc.
  - Visuals for all cities partners with MH to push the special offer and the cities: OOH campaign, social media and digital campaign



## 1. Priority Markets

### NORTH AMERICA

#### Market Situation

In August the USA have for the first time surpassed prepandemic figures with an increase 3.2% over 2019. Thanks to an overall very positive summer the USA are now trailing 2019 with -15.6% (Jan-Aug) and regained it's position as second biggest foreign source market for Switzerland.

One reason for this positive surge is of course that the pent-up demand was huge. Many people have postponed their Europe vacation not once but twice and nothing could stop them, not even a 'war in Europe', the skyrocketing inflation that we have in the USA, or the much-reported issues at European airports. The weak Euro made a European vacation also attractive, despite price increases. While for this year this mainly results in bigger spending during the vacation, this could also have a positive impact on 2023 bookings.

In 2022 we of course also benefitted from the Oberammergau-Bonus and still many guests had outstanding credits with TO's.

Looking at 2023 we see currently very high airfares, which is a challenge mainly for Tour Operators sourcing their products now. There won't be many people cashing in 'travel credits' from the pandemic anymore and there is still a lot of general uncertainty (inflation, energy crisis, geo-political issues with Russia and China), which have the potential to destabilize the recovery.

Despite all this, during the ST North America workshop in the Valais we received outstanding feedback in regard to early bookings for 2023.

Canada overnight figures compared to 2019:

Jan - Aug: -26.7%

Aug: -2.7%

#### Campaigning & Activation

##### 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



## KAM

### KAM

- 4-page Advertorial on Virtuoso Life Magazine, September/October
- Trade webinar with Interlaken Tourism, September 8
- Virtuoso webinar by SkiUSA presenting CH, September 12
- Virtuoso Webinar Zermatt, September 14
- ILTM Cancun, September 19 - 22
- Webinar with Keytours Vacations, September 21
- 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

### SCIB

- Soiree Suisse, Washington D.C., September 14
- Webinar for MME, September 21
- IMEX America, Las Vegas, October 11 - 13

## KMM

### KMM:

- Media Trip Arts & Culture
- TV production PBS in Lucerne, Zurich, Thune, Vaud and Gruyère
- Exhibition St Gallen Textile Museum at Bard Graduate Center
- Media Trip Textile in St Gallen



## Future Activities

### **KAM**

- Trade webinar with Europe Express, November 3
- Signature Travel Network Conference Las Vegas, November 8-11
- Trade webinar with Swiss Travel System / Rail Europe, November 17
- USTOA Austin TX, Nov 28 - Dec 2
- Trade webinar with Schilthorn, December 15

### **SCIB**

- GIS Palermo with pre Tour to Luzern, November 5 - 12
- M&I Americas, Dom Rep, November 16 - 19
- SITE Holiday Soiree, Toronto, November 29
- Networking Event, Toronto, November 30
- Webinar for Prestige, December 8
- SwissRead, December 13

### **KMM**

- **Black Travel Alliance Media Market Place November 18-19**
- CBS Filming in Zurich, Jungfrau top of Europe, GEX December 12-17
- NBC Filming : All Access Hollywood "Get Lost with Lindsay" in Montreux, Basel, Geneva and 1 mountain destination TBC December 1-5
- Trade Media at the Bard Graduate Galery St Gallen cocktail

## Interesting observations

As per 1st November 2022 Oliver Weibel will start as Director Canada. An invitation to the Annual Networking Conference of the General Consul in Montreal was issued for the 24th October 2022 in order to present the attendees the current Tourism situation Canada / Switzerland. 41 attendees from politics, economy and tourism were invited to participate including Oliver Weibel - as the first official presentation.





## 1. Priority Markets

### UK/IRELAND

## Market Situation

### General overview UK

The UK economy is officially in recession. 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 11% in October 2022. The exchange rate GBP-CHF has been at historic lows - below 1.10 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 in the world. 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 nine months of 2022, the number of overnights from the UK in Switzerland is still down by about 23%. 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. And in August and September, compared to 2019, overnight reached minus 10 and minus 15% respectively, indicating a slowly improving situation, especially in leisure.

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.

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. This situation has improved and there are no more capacity restrictions for the winter season, so we expect an increased number of flights - up to 80% of 2019 level - and again lower fares, after the record fares in the summer.

### 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 slowly increasing and business travel recovering slowly, we are confident that in 2023 we reach the 2019 numbers or even overpass them.

## Campaigning & Activation

16-18 Sept: sponsorship of Goodwood Revival Festival



- Physical presence with a Carrera track activation (based on a Swiss Miniature landscape) to engage the 150'000 audience (over 3 days)
- Swiss hospitality with Swiss wine and Swiss cheese
- Distributed bespoke GToS flyer incl. competition element - 'Win A Trip to Switzerland'
- Distribution of the bespoke produced GToS video content,
- Branding activation in and around festival, incl. on the motor racing circuit
- RF advert in Festival magazine
- ST branded naming on physical festival map
- Online hub on goodwood.com - x3 online content pieces, and amplified on social channels and the Goodwood Revival App

22-25 Sept: sponsorship of Laver Cup Tennis Tournament, London

- OOH activation with x2 RF branded buses and x1 fully wrapped E-Taxi (4 weeks)
- SoMe campaign to push x2 competitions: 1) Meet and Greet with RF and 2) Win a Trip to Switzerland
- Activation at O2 Tournament Fanzone - physical presence with a Carrera track activation (based on a Swiss Miniature landscape) to engage the 150'000 audience (over 3 days)
- Distributed bespoke RF flyer incl. competition element - 'Win A Trip to Switzerland'
- Switzerland Tourism branding activation within O2 Arena during the tournament

11 Oct

- Winter print content collab with Red Bulletin (4 page advertorial)
- VS, BE & 100% Women and Swisstainable
- 1.3mio distribution

16 Oct

- Sunday Times content collab
- Distribution of 50k copies of ST Winter magazine within the Ski Special edition of the Sunday Times
- Print Ad within Sunday Times Ski Special - Front Cover slip
- Online article featuring Lucerne City - Winter. Amplified via SoMe



Oct

- Content collab with Wallpaper for ZRH
- Promotion of Hotel Noel
- Online article with SoMe amplification and e-newsletter promo inclusion

## KAM

A welcome event for the new Head of Trade Evelyn Lafone was organised in early September with 15 tour operators and industry specialists attending.

A special 12-page insert on Luxury Travel to Switzerland was produced and distributed to 14'000 agents via the leading industry publication Travel Weekly and Aspire Travel Club.

## KMM

6 September: Winter Launch with partner Valais and approx 40 media representatives to kick off winter in Switzerland

8 September: Distribution of Media Newsletter with topics such as: winter news 22/23, Roger Federer competition, Nature Spa, Autumn strolls, e-bike tours, new cheese train, flights Bristol-Zurich

14 September: ATN Adventure Travel Network event, joint event with KAM, participation of Alex Herrmann in panel discussion and positioning Switzerland as the European adventure capitol

22 September: LISTEX event, participation Myriam Ziesack in panel about sustainability and present Swisstainable

10 October: Winter event Crans-Montana, KMM team UK invited to support PR agency that is looking after Crans

13 October: Distribution of Media Newsletter with topics such as: Zurich Art weekend, RE-Luxury Geneva, (W)Interlaken Card, GToS mobile app, SKATE at Somerset House, Golden Pass Express

15 October: Snowshow Birmingham - joint activity with KAM, 18 media representatives present

25 October: Social with Media, networking event with approx 25 media representatives



## 2. Active Markets

### AUSTRALIA

#### Market Situation

Appetite for overseas trips from Australia and New Zealand is still recovering strongly. According to a survey recently conducted by the ETC (European Travel Commission), 60% of Australians are planning a long-haul trip in 2022, with Europe high on their wishlist. Exploring Europe's cultural and historical heritage is the leading motivation for those travelling to Switzerland and Europe in the next months.

ST SYD is expecting that 60% of the 2019 overnights will be reached by Q4 2022. By the end of 2023, it is estimated that the 80% mark will be hit.

#### Campaigning & Activation

1 October: Swiss Festival in Melbourne. Approx. 500 guests attended the first post-pandemic Swiss Festival in Melbourne (ticketed event). Scavenger hunt with various Swiss prizes. ST and partners featured in printed booklet.

E-Newsletter to Trade (to be planned end of October)

Holiday and Travel Show: 22-23 October in Brisbane, 29-30 October in Sydney. End-consumer travel Show. Switzerland Tourism will be present with a 3x6m stand and various promotions (in coop. with TO partners and their Switzerland products).

6 October: Travel Project / nib insurance Podcast: Destinations podcast initiated by 'Melbourne Travel Project' in coop. with NIB Travel Insurance. Reach of nearly half a million listeners with destination podcast 'Switzerland'. Topics: highlights of Switzerland, gastronomy, fun-facts, public transport, swisstainable.

#### KAM

2 September: VIP thank you lunch with Trade: 8 CEO's of Australia's top travel companies and TO partners joined team ST for an exclusive lunch at Swiss restaurant Bei Amici.

8 - 16 September: Switzerland Travel Experience 2022. First post-pandemic roadshow with 10 Swiss partners, 5 cities visited - Melbourne, Brisbane, Sydney, Auckland and Christchurch. Trade Agents events, Sales Calls with TO's and Media events in all cities. Hybrid event in Sydney with panel discussion on Swisstainable. Total over 400 agents plus 100+ attended virtually.

8 - 9 September: Travel Managers Conference. First TM conference after the pandemic. Over 300 Personal Travel Managers from all over Australia. ST booth in exhibition area, 1on1 meetings, break out- and networking sessions with agents.

27 October: Meet and greet reception with Consulate General of Switzerland and Simon Bosshart: More reasons to celebrate as incoming Consul General Conny Camenzind has arrived in Sydney. At the same time, Simon Bosshart is visiting the market for the first time in three years. 20 top TO



partners and media have joined the intimate lunch with presentation.

28 October: MTA suppliers event. Thank you event from MTA Mobile Travel Agents for their preferred suppliers. Meet and Greet with MTA Agents and MTA head office.

## KMM

8 - 16 September: Media events during Switzerland Travel Experience Roadshow in Melbourne, Sydney, Brisbane, Auckland and Christchurch.

September: International Traveller Print and Digital campaign – Sustainable Switzerland – a guide to conscious and regenerative Swiss restaurants and hotels

September: Signature Luxury Digital feature: The ways to go green

September: Holidays with Kids: Digital feature covering Jungfrau Region and must see ski resorts

September: Vacation & Travel Mag. Feature on Million Stars Hotel and 6 unique Switzerland Bubble Hotels

September: Media trip 'STS behind the scenes'

October: LATTE (travel trade online magazine): Switzerland as Destination of the month. Various features with digital banner and content campaign over 4 weeks. Topics: Swisstainable, Urban running, STP4,

October: Media Trip 'Health Travel in Switzerland'

First story already published on 07.10.22 by Brian Johnston: Zurich Travel Guide and things to do / Nine Highlights.

## Future Activities

Holiday and Travel Show: 5-6 November in Melbourne. End-consumer travel Show. Switzerland Tourism will be present with a 3x6m stand and various promotions (in coop. with TO partners and their Switzerland products).

3 November: Grindelwald Switzerland meets Grindelwald Tasmania. Lunch with two Tassie based journalists in Hobart.

2 November: Grindelwald Switzerland meets Grindelwald Tasmania. Exclusive event for Jungfrau Partners in Tasmania. 10 agents at training/presentation and networking lunch at the Swiss Village of Grindelwald. Another 10 agents joined ST at a dedicated Jungfrau/Switzerland Training in Hobart.

10 November: Tourism Summit Aotearoa



## 2. Active Markets

### AUSTRIA/HUNGARY

#### Market Situation

Österreich's Wirtschaft boomt; heuer wird ein Wachstum von 4,8% angekommen. Allerdings wird für 2023 eine Stagnation auf 0,2% erwartet; Unternehmer und Konsumenten sind verunsichert und mit Investitionen (auch mit Konsum) sehr zurückhaltend

Die Staatssekretärin für Tourismus nimmt an, dass es in der Hotellerie zu Preissteigerungen von 20% (!! ) kommen wird. Auch der Wintersport wird deutlich teurer: Tageskarten der großen Skigebiete kosten zwischen € 55,- und € 68,50-; im Vergleich zum letzten Winter rechnet die Staatssekretärin mit einem Preisanstieg um 10%. Dynamic Pricing kommt immer mehr.

Vorverkauf Saisonkarte in den großen Skigebieten in Salzburg: € 692,- . Ab 9.12.2022: € 824,- (= +19%).

Überlegungen zur Kostenreduktion: keine Sitzheizungen, langsamerer Liftbetrieb, Einschränkung Nachtskilauf.

S. ORF-News: <https://orf.at/stories/3289198/>

#### Best practice competitors

Energieeffizienz der AT Skigebiete wurde in den letzten 10 Jahren deutlich verbessert:. Der Verbrauch sank, - obwohl die Nächtigungen zwischen 2008 und 2019 um 20 Prozent stieg. Lt. Umweltbundesamt ein Minus von rund 50% pro Übernachtung.

#### Campaigning & Activation

- 14. September 2022: Ganzseitiges Advertorial zum Thema Herbst im Like It Magazin, Auflage 40'000
- ab 19. September 2022: 2-wöchige Social Media Kampagne sowie Digital Konsole auf Oe24.at zur Promotion der STP4-Aktion in Österreich
- 28. September - Oktober 2022: Online-Promotion des Kulturherbst Bern über die digitalen Kanäle des österreichischen Kunstmagazins Parnass, 13'333 Kontakte
- 25. Oktober 2022: Ganzseitiges Advertorial zum Thema Winter im HUB Magazin, Auflage 5'000

#### KAM

- 15. September 2022: B2B Herbst Newsletter an 153 AT-Reiseveranstalter geschickt
- 19. September 2022: Halbseitiges Advertorial für den Golden Pass im BTB Jubiläumsheft von Tip
- 28. September 2022: 8-Seitiges Schweiz Spezial von Top am Counter. Auflage 5.000 Stück, werden



an die AT-Reisebüros versendet.

- 10. - 13. Oktober 2022: BTB Busmailing an 190 Adressen in ganz Österreich (FIT und Gruppen), in Korporation mit STC

- 22. - 26. Oktober 2022: 4-tägiger ÖRV Kongress in der Schweiz zum Thema Nachhaltigkeit mit 39 AT-Reiseveranstalter

## KMM

### Presse e-Newsletter:

Im September und Oktober 2022 wurden 2 Presse eNewsletters an je 200 österr. JournalistInnen versendet.

### Tourismuspresse.at-Aussendungen:

Im September und Oktober 2022 wurden 5 Tourismuspresse.at-Aussendungen zu an je ca. 33'500 Kontakte versendet.

### Gruppenmedienreisen:

- 17. - 20. September 2022: Gruppenmedienreise Walliser Weinweg mit Eurotrek mit 6 österreichischen JournalistInnen.

- 30. September - 2. Oktober 2022: Gruppenmedienreise zum Kulturherbst Bern mit 6 österreichischen JournalistInnen.

### Pressekonferenz:

Am 14. September 2022 wurden News aus den Schweizer Boutiquestädten inkl. einer persönlichen Präsentation von Bern Welcome für 18 österreichische Medienvertreter in der Residenz des Schweizerischen Botschafters in Wien präsentiert.

## Future Activities

### November 2022

- Doppelseitiges Advertorial zur RhB im Reiselust Premium Magazin
- Corps Touristique Galaabend - nationale Tourismusorganisationen in Österreich laden österreichische Reiseveranstalter sowie Reisejournalisten ein
- Advertorial bei Reisethek zum Thema Swisstainable
- Advertorial für das Excellence Program von STS bei Tip (Online + Print)

### Dezember 2022:

- RhB + Railtours Online Kampagne mit einem Österreichischen Medium (Investment EUR 14.000)
- ÖBB Rail Tours Traumzüge Katalog
- KAM Marketing Promotion mit ST/STC/STS von EUR 18.000. Reiseveranstalter wird noch bestimmt. Ziel ist es eine Weihnachts/Ende des Jahres Promotion zu machen

### Januar 2023:

- Excellence Fam Trip mit STS

## Interesting observations



Energieeffizienz der AT Skigebiete wurde in den letzten 10 Jahren deutlich verbessert.: Der Verbrauch sank, - obwohl die Nächtigungen zwischen 2008 und 2019 um 20 Prozent stieg. Lt. Umweltbundesamt ein Minus von rund 50% pro Übernachtung.





## 2. Active Markets

### BRAZIL

#### Market Situation

Heading into the last quarter of the year, the global economy keeps facing challenges, especially with inflation being pressured. In Brazil, the situation has started to mitigate, but far from being solved. For two months in a row, the index that measures prices in Brazil, the IPCA, registered a deflation of 0.68% and 0.38% in the months of July and August, respectively. In the accumulated balance in the 12-month period, the variation decreased from two figures and is currently 8.73%.

However, the average downfall in prices did not happen for the majority of product and service items, but very specific to fuel, like gas, diesel, and ethanol. The case is that the limitation measure of 17% in the state tax on fuels managed to lower the prices significantly to consumers in gas stations. In addition, the Brent oil, a reference to gas in Brazil, went below 120 dollars per barrel to range, currently, around 90 dollars. Thereby, it allowed Petrobrás to perform a sequence of reductions in the selling price of gas in the refineries.

On the Other hand, seven out of nine groups analyzed by the Brazilian Institute of Geography and Statistics (IBGE) registered a raise in the last data collection in August. The prices of food, on average, have kept consecutive increases, being this group the one that presents the highest weight in families' budgets.

Job positions in the country have grown and contributed for the worker to restore, in part, the loss of income due to inflation. The unemployment rate measured by IBGE was 9.1% in the quarter that finished in July, the lowest threshold since the end of 2015. Nevertheless, as the ingress and regress in the job market have been happening, on average, with lower paychecks, that makes the available income gain difficult in families' households.

Besides that, according to data by the National Confederation of Commerce (CNC), the rate of indebted families and presenting overdue bills, the defaulting ones, are beating records, totaling 79% and 29.6% of families, respectively. Part of this increase is linked to the difficult consumption in face of higher prices. However, there's another explanation; the expressive rise in interest to consumers, following the trajectory of rise in the economy's basic rate, the SELIC. In a year, the rate has increased from 2% to almost 14% a year.

Consequently, families with overdue bills in a record threshold, high interests and inflation still pressuring, it is natural to imagine the restraining impact on sales. So much so that the last data of the sector was negative, with sales retraction of 6.8% in July, increasing from the -3% seen in the previous month. From the 10 segments analyzed by IBGE, six presented a downturn, and the supermarkets presented stability.

Considering the service sector, the scenario is more favorable, with the highlight to activities linked to tourism. In general, there was a 6.3% growth in July, compared to the same period last year. However, when the accommodation and food, and air transport sectors were analyzed, the variations are steep, of 22.3% and 15.4%, respectively.

And FecomercioSP monthly survey proves the positive moment that the national tourism is at. The revenue in July was 18.3 billion reais, an increase of 32.1% in the annual turnover. The demand is heated, but it is important to highlight that part of this raise is due to the increase in prices, above all, flight tickets. According to the entity's estimations, tourism's inflation reached 31.3% in a year by August, against the 8.73% of the general average inflation in the country.

As previously seen, the economic variables and sectors point in different directions, and this instability and unpredictability make the country's stronger recovery difficult. What should be uplifting by the end



of the year is the injection of the R\$ 600 amounts from the Brazil Aid, besides the 13th-month salary at the end of the year. Recalling that with more people formally employed, the workers will have more resources available in November and December. Yet, again, with a record number of families with overdue bills, these resources should be destined, mostly, to paying debts.

The problem is that there is an indication of a global recession in 2023, driven by the rise in interest this year. Expensive credit to companies and consumers entails fewer investments and expenses of families, in other words, a cooling down in demand.

Therefore, the remedy to hold inflation back (increase interests) will have a negative collateral effect and Brazil, which couldn't render a stronger traction to upturn, should follow with a positive pace, but a weak and limited one.

## Campaigning & Activation

- JHSF Polo Challenge - Polo Challenge organized by JHSF company at Fazenda Boa Vista. Guests: 1'500 – owner of luxury houses. St. Moritz sponsored the event as a special event. ST presence: lounge at the event offering Nespresso coffee, basket full of Swiss products (cheese, wine and chocolate) for a luck draw. St Moritz magazine distributed to the guests.

- Dedicated Newsletter **Highlight:** 7132 Hotel. Two (2) **sendings:** Sep 27<sup>th</sup> and Oct 13<sup>rd</sup>. **Mailing:** 26.500 mails for travel agents; 160 mails for corporate travel managers; 1.800 WhatsApp messages to TAs; **Opening rate:** 24,72 e 25.2%

## KAM

SCIB: Study Trip – Wedding Destination. Internacional study trip focused on destination wedding covering Ticino and Luzern region. Two (2) Brazilians **Wedding Planners** participated in the trip. ST support: Flights, STP, overnight and program.

- RELAIS & CHATEAUX FAMTRIP 2022: Famtrip in partnership with Relais & Chateaux representative in Brazil. Six (6) selected luxury travel agencies from different regions across the country. Itinerary included: *Geneva, Hôtel de la Cigogne; Vevey, Grand Hôtel du Lac; Crans-Montana, Aïda Hotel & Spa + Hostellerie Du Pas De L'ours; Zermatt, Chalet Hotel Schöneegg; Lenk, Lenkerhof Gourmet Spa Resort; Zurich, Alex Lake Zurich.* ST support: *Swiss special barter conditions, STP, and program.*

- *Switzerland Travel Mart Luxury (STML) 2022: Held in Gstaad. Nine (9) buyers from Brazil. One-to-one appointment and many opportunities of networking between brazilian buyers and swiss tourism partners within the luxury market. Post-convention tours. ST support: Flights, STP, overnight and program.*

- *Switzerland Travel Mart Health (STMH) 2022: Held in Bad Ragaz. Three (3) buyers from Brazil. One-to-one appointment and many opportunities of networking between brazilian buyers and swiss tourism partners within health tourism segment. Post convention tour: 8 preventive & wellness buyers (CIS / UK / Brazil). ST support: Flights, STP, overnight and program.*

- *D.A.R 2022: ST was one of the sponsors for Rogeria Pinheiro's mentorship program. Network opportunity with more than 100 travel agencies from across the country. Workshop session with 10-min one-to-one presentations for group of agents.*

- *White Sales Calls 2022: Customized agenda of meetings, trainings and networking events in São Paulo, Belo Horizonte and Rio de Janeiro to promote winter season. Swiss hotel partners: Roberta*



Panella, Kulm St Moritz e Kronenhof Pontresina; Thomas Wieser, 7132 Hotels.

- Online training presentations: 1. Youtube Live by Orienter Travel with 200 agents in attendance. Special partnership with St Moritz Tourism. Recorded video presentation achieved 868 views. 2. Primetour: Special presentation regarding Primetour attendance at Brazil Workshop in Zurich with focus on their impressions of the event and post Convention tour.

- Fenix Retreat 2022: ST was the main sponsor for the 3rd edition of Fenix Retreat, Rogeria Pinheiro's mentorship event held in Peninsula do Maraú, Bahia. Network opportunity with a selected group of 16 travel agents from across the country. 60-min Workshop session focusing on **Sustainable & Responsible travel (Swisstainable presentation)**. Workshop activity & competition: Best proposal of sustainable actions to be implemented in the travel agency business; 2 winners: Switzerland famtrip - sustainable itinerary 2023;

## KMM

- Media Trip @marina\_xando: 135K followers, media trip around Switzerland highlighting the effective swiss public transport. Segmentation: Attractions tourer, luxury. ST support: 2 Swiss Travel Pass.

- INTL Media Trip @nathdiasgomes: 43.8K followers, International media trip Behind the Scenes. Segmentation: Attractions tourer, nature lover. ST support: flights, STP, program and meals.

- CNN Media Trip @cnviagemegastronomia and @danielafilomeno. Media trip around to Switzerland covering: Zurich, Grindelwald/ Jungfrau, Luzern/ Engelberg/ Titlis, Vevey and Gruyère. The tv show will be broadcast between March-April, 2023 in CNN Brazil Tv. The content will be shared on social medias: Instagram and Youtube. ST Support: flights, STP, overnights, program and meals.

- INTL Media trip Health Tourism - Two (2) Brazilians journalists participated in the trip, **Exame Magazine**: 65k copies and digital and **The Traveller Magazine**: 15k copies and digital. ST support: Flights, STP, overnights and program.

- Media Trip Robb Report and Top Magazine - Media trip combined with Victorinox - celebrating 125 years of SAK **Robb Report**: 20k copies and digital & **Top Magazine**: 40k copies and digital. Segmentation: Attractions tourer and luxury. ST support: flights, STP, overnights and program during 4 days – after that 3 overnights covered by Victorinox.

## Future Activities

- Seeding activity with influencers Xmas
- World Cup game Switzerland x Brazil
- STS Excellence Program Famtrip Group
- Post ILTM Famtrip (Ski focus): TTW Group's top agents - St Moritz and Zermatt.

## Interesting observations

Le dimanche 2 octobre 2022, plus de 153 millions d'électorales et électeurs brésiliens étaient appelés aux urnes pour élire le Président et Vice-Président de la République, 27 Gouverneurs et Vice-Gouverneurs, 513 députés fédéraux et 1059 députés étatiques ainsi que 27 sénateurs. Le deuxième tour est prévu le 30 octobre prochain. Veuillez trouver ci-après les principales données électorales ainsi que les premières indications issues du premier tour après l'annonce tardive des résultats de la part du Tribunal Supérieur Electoral - TSE.

Le premier tour des élections présidentielles a donné les résultats suivants : Luiz Inacio Lula da Silva



48,4% (57,2 mio. de voix), Jaïr Bolsonaro 43,2% (51 mio.), Simone Tebet 4,17% (4,9 mio.) et Ciro Gomes 3,05% (3,5 mio.). La différence de voix entre les deux premiers candidats a été d'un peu plus de 6 millions de voix. L'abstention a été légèrement supérieure à 20%, chiffre pratiquement analogue à celui de 2018.

Au Sénat, où le gouvernement actuel n'a jamais eu de majorité, le parti du Président (Parti Libéral - PL) a obtenu des victoires significatives et sera la principale force politique. Ce bon résultat a été aussi confirmé à la Chambre des députés, où le PL pourra désormais compter sur 99 représentants. Cette tendance positive s'est également manifestée dans les Etats les plus importants du pays : Minas Gerais, Rio de Janeiro et São Paulo. Dans l'Etat de São Paulo, le deuxième tour verra le candidat bolsonariste (ex-Ministre de l'Infrastructure Tarcisio Gomes de Freitas, arrivé en tête au premier tour) affronter celui du PT (Fernando Haddad, ex-Ministre de l'Education et ex maire de São Paulo). La majorité des sondages avait donné à Lula une avance de 6 à 12 points sur le président Bolsonaro : le résultat du premier tour a montré que la différence entre les deux candidats était bien mineure. Les premières réactions de la campagne bolsonariste sont ainsi très critiques vis-à-vis des principaux sondages. Par contre, les critiques virulentes de Bolsonaro à l'encontre du système électoral brésilien (et, en particulier, du système de vote électronique) n'ont pas été relancées. Le processus électoral et le scrutin se sont bien déroulés.

Bolsonaro et les autres candidats bolsonaristes ont montré une bonne résilience dans le Sud-est du pays. Ces prochaines semaines, la capacité de rattrapage de Bolsonaro sera notamment liée à l'utilisation de grands moyens financiers en faveur des couches les plus pauvres (surtout dans le Nordeste) notamment via l'Auxilio Brasil (8 milliards de dollars environ), mais aussi à la capacité de renforcer le sentiment « antipetista ». D'autre part, si Bolsonaro voudra essayer d'intercepter les préférences des électeurs qui ont soutenu les candidats ayant quitté la course après le premier tour, il sera obligé de modérer son discours. Dans ce cadre, il pourra compter sur le soutien de certains Gouverneurs et des sénateurs et députés du PL récemment élus.

Lula, qui aurait évidemment préféré de gagner au premier tour, demeure le favori pour le deuxième tour. Il sera appelé à essayer d'élargir sa coalition afin de capter les électeurs modérés, notamment dans la région du Sud-Est (São Paulo, Rio de Janeiro), tout en essayant de défendre son grand réservoir de voix dans le Nordeste du pays. Si la « troisième voie » a fait les frais de la polarisation entre les deux principaux candidats, dans la situation actuelle, le soutien de la sénatrice Simone Tebet à Lula devient central en fonction du deuxième tour. Dans le cas de Ciro Gomez, qui a obtenu une décevante quatrième place, les scénarios sont plus compliqués et son parti sera appelé à se positionner dans les prochains jours. En tous cas, indépendamment de qui sera le prochain Président de la République, ce dernier devra faire face à un Congrès très fragmenté, où les forces du « Centrão » seront majoritaires.

Commentaire

Le premier tour des élections a été précédé d'une difficile et longue campagne, parfois violente et conflictuelle et qui a malheureusement contribué à augmenter les divisions déjà existantes au sein de la population brésilienne. En dépit de plusieurs signaux préoccupants dans les semaines qui ont précédé le scrutin, le Brésil vient de vivre une journée électorale relativement paisible et sans incidents majeurs. Mais la dureté de la première partie de la campagne laisse présager des semaines intenses et changées d'émotions : les deux leaders feront tout ce qui est en leur pouvoir pour déstabiliser l'adversaire. Pour le moment, les questions de contenu et de programme ont été quasiment absentes : la politique économique ou celle étrangère n'ont, par exemple, pratiquement jamais été abordées par les candidats. Cette situation pourrait-elle changer dans les semaines à venir et amener une discussion plus constructive dans le débat politique ? Les principaux analystes politiques sont plutôt sceptiques à cet égard.



## 2. Active Markets

### CZECH REPUBLIC

#### Market Situation

- Despite of high year-to-year inflation rate, Czechs are travelling without any major restrictions.
- Big Czech tour operators are now selling its Switzerland products and trips for 2023 with higher interest by Czechs.
- Covid-19 situation with low level of new daily cases. 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 September 2022 +18,0 % (July 2022 +17,5 %; May 2022 +16 %; March 2022 +12,7%; January 2022 +9,9 %)
- Inflation rate in  
September 2022 + 12,7 % (July 2022 +10,6 %; May 2022 +8,1 %; March 2022 +6,1%; January 2022 +4,5 %)
- Industrial production in August 2022 +7,2 % (June 2022 +1,7 %; April 2022 -3,8 %; February 2022 -0,3%; December 2021 -2,1 %)
- Construction production in August 2022 -0,4 % (June 2022 +0,8 %; April 2022 +4 %; February 2022 +18,9%; December 2021 +8,1 %)
- International trade – import: +25,5 % in August 2022 (+15,9 % in June 2022; +13,3 % in April 2022; +16,5% in February 2022; +19,9 % in January 2022)
- International trade – export: +27,9 % in August 2022 (+15,3 % in June 2022; -1,3 % in April 2022; +7% in February 2022; +8,2 % in January 2022)
- Average gross wages and salaries +4,4 % in 2Q/2022 (+7,2 % in 1Q/2022; +4% in 4Q/2021, +5,7% in 3Q/2021)
- General unemployment rate in August 2022 with 2,5 % (June 2022 with 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](http://www.czso.cz)

- Exchange rate recorded higher volatility in last two months between level of 24,748 CZK to 26,20 CZK per 1,- CHF.

SOURCE: Czech National Bank, [www.cnb.cz](http://www.cnb.cz)

#### Campaigning & Activation

- 8. 9. – ST Newsletter 9/2022 focused on September 2022 with promotion of: adrenaline attraction in



Zermatt with Zermatt Bergbahnen; Top of Europe Pass; Ibex Safari on Pilatus; brunch on Lake Lucerne; Stellplaetze possibilities in Davos Klosters; Landwasser Express by RhB; James Bond car exhibition in Vaud; Prison hotel Barabas in Lucerne; Prague railway day with ST stand; Ticino in travel TV broadcast at CT1; new camping brochures TCS free for ordering via MojeSvycarsko.com; IG influencer contest

- 8. 9. – MySwitzerland Pro platform promotion via B2B trade e-newsletter of trade magazine TTG.cz
- 19. 9. - STS Autumn selling promo at Zdopravy.cz: Advertorial placed at most important transport on-line newspaper Zdopravy.cz promoting 4-day Swiss Travel Pass autumn selling promo by STS, Swisstainable experiences and GTToS.
- 20. 9. - GTToS in Luxury Guide Winter 2022/2023: 1/1 GTToS advertisement placed in premium travel and lifestyle magazine Luxury Guide 9/2022. AD is promoting winter possibilities of GTToS for Switzerland guests with one ticket by STS. QR code linked to our website with GTToS details.
- 10. 9. – Switzerland at Regional railway day in Prague 2022 (cooperation with Czech Railways & RhB)
- 15. 9. – SWISSmag Winter 2022/2023: New edition of printed magazine SWISSmag focused on Winter season 2022/2023 with 62 pages tourism / culture content incl. 6/1 GTToS special and GTToS cover page + 1/1 AD published in cooperation with HST in Prague and with integration of all winter Market Partners
- 3. 10. – 6/1 advertorial focused on sustainable travel in Switzerland placed in premium travel magazine Travel Life
- 13. 10. – TTG Newsletter newsletter with Switzerland winter news: Promotion of the ST press conference and its outcomes and winter news with agreed B2B trade newsletter of the TTG in the Czech market
- 19. 10. – GTToS promotion at Zdopravy.cz: Advertorial placed at most important transport on-line newspaper Zdopravy.cz promoting GTToS possibilities and Swisstainable traveling in Switzerland with added promo of JFB, Pilatus, Rigi, RhB and special Autumn selling promo of STS (4-days Swiss Travel Passes with 30% discount)
- 22. 10. – ST Newsletter 10/2022 focused on October 2022 with promotion of: Nature Spa offers; STP Promo Autumn campaign; new train daily connection Prague – Zurich via Basel by Czech Railways; World attempt by RhB; Winter Guest Program Davos Klosters; Family package of Swiss Youth Hostels in Davos Klosters; Guest card in Chur; new ski pass concept in Jungfrau Ski Region; Birthday offer by Schilthorn Cableway; free ski equipment transport by SWISS; new edition magazine SWISSmag focused on Winter 2022/2023; wellness package SGV & Rigi; First Track Bettmerhorn by Aletsch Arena; Flexi Ski Pass Winter offer in Zermatt; Winter experiences at Pilatus (Fondue gondola, snowshoe hiking, sledging); New 5\* hotel in Samnaun (Hotel Relais & Chateaux Chasa Montana); highest located Christmas market in Europe at Pilatus; travel presentation by journalist Pavla Apostolaki focused on St. Gallen, Appenzell, Davos, Lucerne and Wallis.

## KAM

- 4. 9. – STML 2022 with two exclusive tour operators (Axamit Travel, EliteVoyage)
- 5. 9. – MySwitzerland Pro promotion via B2B trade website TTG.cz in form of advertorial with photos and video presentation of the ST platform
- 28. 9. – ST Middle Europe Workshop in Mürren with 13 TO's and 1 KMM



- 11. 10. – Sales calls for Pilatus-Bahnen with TO Axamit Travel, TO Akord and TO EliteVoyage in Prague

## KMM

- 5. 9. – MySwitzerland Pro promotion via B2B trade website TTG.cz in form of advertorial with photos and video presentation of the ST platform

- 16.–21. 9 Mini-Intl Media Trip STS Behind the scenes with journalists from MF DNES

- 19. 9.–1. 10. TV media trip with filming TV documentary “Hidden secrets of Switzerland”

- 22. 9.–2. 10. Family media trip (Engadin Scuol, Bernina Express, RhB, Val Poschiavo, Alp Gruem, Berguen, Aletsch Arena, Schilthorn) organized for travel and outdoor magazine Travel Life and travel Festival Obzory

- 29. 9.–2. 10. Mini-Int. Media Trip Discover Switzerland sustainable gastronomy with participation of gourmet freelance journalist and influencer Petra Pospechova

- 10. 10. – ST Press conference – WINTER 2022/2023: Press conference with active participation of Pilatus-Bahnen AG and representatives from the Switzerland embassy in Prague in the location of Paralel Polis in Prague

- 23.–30. 10 Media trip RhB World Record with iDNES.cz journalist

## Future Activities

- visit of ST CEO Martin Nydegger in Prague (15.–16. 11. 2022)

- ST Newsletters (B2C & B2B)

- various media trips

- various advertorials

- 12.–13. 11. - ST presentation and partnership with Festival Obzory 2022

- Premium Guide Winter special with Switzerland advertorial contribution

- PR article at travel website Travel Fever + Switzerland promo in its e-newsletter

- B2B promo winter campaign focused on Davos Klosters with TO Experitour

- Video promo of ski in Davos Klosters in cooperation with offer CD Ski (discount for ski rent in Davos for passenger of Czech Railways)

- Video promotion in shopping center OC Flora in Prague

- Magazine Switzerland as a supplement in outdoor travel magazine SNOW and in magazine Premium Ski (only to magazine subscribers)



## 2. Active Markets

### INDIA

#### Market Situation

The latest statistics on overnight stays and arrivals, i.e. the figures for the month of August 2022, while still recording negative values on 2019, show us that the trend on 2019 is nevertheless improving, bringing the values for the first eight months of the year to -65.8% for arrivals and -63.1% for overnight stays.

For the month of August alone, compared to the reference year 2019, the drop in arrivals was 48.3% (17,500 arrivals compared to 33,827 in August 2019; 40,446 overnight stays compared to almost 70,000 in the same month of 2019).

As the high season is no longer in full swing (although we register both in overnight stays but also from our daily exchanges with tour operators an extension of the summer season), the visa situation, which had been so worrying but also constituted a brake on recovery, has improved. Waiting times for a slot at VFS (necessary to apply for a Schengen visa), have halved (but still remain a few weeks, up to a maximum of 4 in some cities). While our Embassy and its visa section are working hard to prepare for the upcoming 2023 season, it remains an unknown how other European countries will react. A continued restriction on the number of visas granted by other European countries could lead again to a situation, if not as critical as it was in 2022, then to a possible slowdown. And this is beyond the control of our Embassy.

As for the current situation, very good news from SWISS. Flights both to/from Delhi and to/from Mumbai will return to the pre-pandemic situation. That is, 7 weekly flights to/from each of the two cities. As things stand, the flights are practically overbooked, despite a general increase in flight prices.

#### Campaigning & Activation

##### 1. Neeraj Chopra – Friendship ambassador for Switzerland in India.

- ST India got a chance to tie up with NC as an endorser
- ST creating content during the trip for social media as well as a paid promotion in 2023.
- The campaign is planned phase wise, and we've completed phase one with great numbers.

##### Phase 1

- Video content was created and edited and uploaded real time with Neeraj doing various outdoor activities.
- Each reel/video garnered organic views in millions.
- Overall organic views of stories, reels and posts are above **25M**
- ST India Insta handle had a growth of followers by 3000 in the last 15 days.
- Organic media coverage about the trip garnered **87.8M** contacts.

##### 2. STS Digital Campaign – STP4 Promotion





- The 4-day Swiss Travel Pass discount promotion was executed on Display & Facebook Newsfeed. The display platforms included in the campaign were Inshort & Dailyhunt.

- The campaign targeting was targeted basis an audience profiling that included the HNI, International travel etc. and covered intent and interest-based targeting.

- The campaign is ongoing

Total Impression: **17'700'249**

Total click to website: **181'901**

### **3. Double Page Print Advertisement in magazines**

- Zurich Advertisements were published in travel and lifestyle magazines namely:

- Conde Nast Traveller

- India Today Spice

- Vistara

Total Circulation: **375'000**

Total Contacts: **1'875'000**

## **KAM**

### **KAM (Leisure):**

- 22nd Aug 2022; Exclusive Destination training for the sales and operations team of upcoming OTA EaseMyTrip.com. Presented Switzerland and its various touristic offerings. Total No. of attendees = 25

- 23rd Aug 2022: Destination training for the Travel Trade in New Delhi. Presented Switzerland and its various touristic offerings. Presentations were made by ST, STS, Rail Europe, SWISS, Titlis Cableways and Aletsch Arena (Virtual). Total No. of attendees = 154

- 25th Aug 2022: Destination training for the travel trade in Kolkata. Presented Switzerland and its various touristic offerings. Presentations were made by ST, STS, Rail Europe, SWISS, RhB, BLS Interlaken & Titlis Cableways. Total No. of attendees = 110

- 6th Sept 2022: Networking Dinner with Key Account A TAs / TOs organized at the Embassy of Switzerland in Delhi during Martin Nydegger's visit to India 5th - 7th Sept 2022. An opportunity for Martin and the new head of the visa section to meet with our travel trade, provide the latest updates / information and instill a sense of positivity for the 2023 season. Total No. of attendees = 26

- 4th - 9th Sept 2022: Switzerland Travel Mart - Luxury Edition (STML) 2022 took place in Gtaad. The Workshop (4th - 6th Sept) was followed by post-tours (6th - 9th Sept). Luxury buyers from across markets got an opportunity to interact with luxury suppliers from Switzerland. Aspen Vacations from India participated at the event.

- 12th Sept 2022: 45 min exclusive webinar for the Indian Travel Trade showcasing Interlaken and its various tourism products. Presentations by ST, Interlaken Tourism, Jungfraubahn and Lindner Grand Beau Rivage. Total No. of attendees = 544

- 14th Sept 2022: Destination training for the Travel Trade in Chandigarh showcasing Switzerland and



its various touristic offerings. Presentations were made by ST, STS; Rail Europe, SWISS and Zurich Tourism (Virtual). Total no. of attendees = 58

- 22nd Sept 2022: Exclusive 45 min Webinar with STS showcase the various products and services for the Indian market, along with the latest news and updates. Total no. of attendees = 574

- 27th Sept 2022: 9 key outbound travel agents from Aurangabad visited the ST office to discuss the various touristic offerings and get the latest tourism-related updates / news

- 11th Oct 2022: ST participated in a training organized by prominent wholesaler and GSA of Rail Europe, Ottilla International Pvt. Ltd. The training was conducted in Kochi for Ottilla's sub-agents in the market. Presentation focused on STS and its various products and services for the Indian market, along with the latest news and updates. Total No. of attendees = 40

- 6th - 13th Oct 2022: FAM Trip organized for 8 lucky winners who performed well in various activities / contests organized by ST (Webinar Series Quiz and Switzerland Travel Academy) and STS (Excellence Program) across 2020 and 2021. The group comprising of prominent TAs / TOs from the market travelled across Les Diablerets, LGR, Interlaken and Zurich, and visited the popular highlights / attractions

- 18th Oct 2022: Webinar showcasing BLS Interlaken, Aletsch Arena, Matterhorn Gotthard Bahn, Swissminiatur and FoxTown. Each participating partner presented their respective product(s) for 15 min to the Indian Travel Trade in attendance. Total no. of attendees = 518

- Aug - Oct: Sales Calls across Delhi-NCR, Kolkata, Mumbai, Chandigarh and Kochi. Meetings with prominent agents from these cities to promote Switzerland and its various touristic offerings, as well as provide the latest news / information / updates. Over 23 key accounts met.

#### **SCIB/MICE:**

- Networking Dinner with few MICE agencies at the Embassy in Delhi for Martin Nydegger's visit to India on 6th September

- Sales call in Delhi - September

- International study trip for Wedding Planners - October

## **KMM**

### **1. Neeraj Chopra Switzerland Trip.**

- For the Neeraj Chopra trip we created a story showcasing his trip as a fun leisure trip with his friends and family to garner more PR around this.

- The strategy for phase 1 was to make it look organic before we announce him as our Friendship ambassador for Switzerland in India in the phase 2.

Total Clips: **58 Clips**

Total Contacts: **134'663'916**

### **2. Swisstainable Veggie Day.**

- On 1 October 2022 - World Vegetarian Day, ST celebrates the Swisstainable Veggie Day.

- As Vegetarianism has a long history in India and no country is so closely associated with vegetarian cuisine like India, this initiative can make a strong noise in the market.



- To capture this, we created a PR push on the day.
- The Media houses were pre-intimated about the concept days before the actual date. The press release was translated into regional languages including Hindi.
- On intimation from HO about the world record being achieved, the press release was disseminated to all media houses across India, with follow-up.
- Top publications & news channels to cover the news were namely – OutlookIndia, DNA, IANS, Kesari etc.

Total Clips: **55 Clips (Print- 49, Online- 25)**

Total Contacts: **9'049'282**

### **3. Participation in the HT Tourism Conclave**

- We participated in the HT Tourism Conclave during Martin Nydegger's visit to India where he was invited to speaker for a session.
- The conclave had speakers including the Tourism Minister of India.
- Nydegger conducted a session talking about our strategy of being sustainable and elaborated on the concept of Swisstainable.
- The event was a hybrid event where they had a walking of over a lakh and over a lakh attend it online.

## **Future Activities**

### **Campaign & Activation:**

- Winter digital campaign (November/December)
- Winter Influencer & Media trip with SWISS (November)
- Neeraj Chopra campaign phase 2 & 3 (November-March 2023)
- B2C Winter Event in Mumbai tbc (December)

### **KAM (Leisure):**

- Destination trainings in Bangalore, Pune, Ahmedabad & Nagpur, along with Sales Calls
- Sales Calls with Schilthorn in Dec 2022
- Webinars: Zurich (28th Oct 2022), Lucerne (6th Dec 2022) and Titlis (13th Dec 2022)
- Visa workshop 23rd - 26th Nov in Delhi and Mumbai with key personnel from SEMA, ST, VFS Global, the Visa Section, and Key Accounts of ST / Preferred Partners of the Embassy Visa Section

### **SCIB/MICE:**

- Sales calls in Kolkata and Hyderabad - November
- Asia Trophy in December



## 2. Active Markets

### JAPAN

#### Market Situation

On 11 October, Japan fully opened its borders to travellers. At the same time, the travel warning was lowered from 2 (Avoid Unnecessary Travel) to 1 (Exercise Normal Precautions).

Travel agents are very busy selling short haul trips. The first tours to Switzerland in August and September were well booked. The winter season is a low period for travel to Switzerland and agents are focusing on packaging for next spring/summer.

#### Best practice competitors

-

#### Campaigning & Activation

- 22-24 September: Tourism Expo Japan, one of the world largest travel fair by JATA, 2 x B2B days and 2 x B2C days. Total 1220,000 visitors. ST presence in Europe booth for individual business meetings, VIP networking and distribution of brochures to end consumers.

- In September, ST launched the first Swisustainable travel brochure in Japan. Beside describing the Swisustainable movement, it offers concrete sustainable travel itineraries and is used in B2C and B2B communication.

- On 8 September, ST held an event with Basel Tourism for the young art community. The event was part of the community marketing activities aiming at the millennial art lovers.

- On 28 September, ST coordinated online exchange Hakone Railways and RhB, update since 2019 last courtesy visit of RhB delegation.

- 2 page advertorials in Train Travel magazine "Tabi-no-Techo (Travel notebook)" with timing of 150th Japan Rail anniversary, published 9 September, Circulations 105,000 copies

- 1 page advertorials in special mook book "Top 150 Japan Rail trip" with timing of 150th Japan Rail anniversary, published 26 September, Circulations: 35,000 copies

- Swiss Railway 175 Special webpage and prize competition on MyS.com launched from 9 September

- On 24 October, Shumito Club (senior social media) e-newsletter had released, featuring 175th Swiss Railway with present campaign, STS autumn promotion, RhB world record challenge, RhB historical trains, 110th Jungfrau Railway.

#### KAM

- 5-7 September: STE Ja[pan]. Over three days, Swiss partners (15 participants) met with travel agents in Osaka and Tokyo. The STE was the first live event after the pandemic where partners from



Switzerland could participate.

- From 12-15 September, a product development tour with Fellow Travel took place in VAUD. Fellow will launch the first cycling product for Switzerland in spring, based on the experiences on that trip
- 19 October: Webinar on Switzerland for all members of the Japan Association of Travel Agents.
- 14 October: Interview with the JTB foundation (research department of JTB travel agent) on sustainability and adventure travel in Japan.

## KMM

### Media Trip

- Ota Campaign media trip with 'Kateigaho' magazine to feature 3 GTToS routes and its Unesco world heritage destinations in St. Gallen, Jungfrau Region and Lavaux.

### Media Result

TV:

- Asahi TV 'See the world by train' on air from Chur Maienfeld, St. Moritz, Bernina Express, Galcier Express, Andermatt, Zermatt, Jungfrau Region. (until 29 Nov)
- NHK BS8K/4K/BS Premium 'Train Journey in the Alps' special program featuring Bernina Express, Glacier Express, Jungfrau Railway, Gornergrat Railway etc. and aired several times.
- Asahi TV morning news: RhB the longest train Guinness record.

Magazine:

- Nodule, travel magazine reports about bisses in Valais.
- Ski Graphic, ski magazine introduces the ski resorts of Zermatt, Grindelwald, St. Moritz, Aletsch Arena as well as ST& Fellow joint ski event.
- Skyward, in-flight magazine of Japan Airline to feature Glacier 3000.
- Randonee, outdoor magazine reports trail running camp based in St. Moritz.
- Field Life, outdoor magazine reports trail running camp based in St. Moritz.

Online:

- Travel Voice, travel trade daily news reports about ST Japan's STE workshop with Swiss partners.
- Yomiuri Online, key newspaper reports about RhB the longest train Guinness record.
- Yahoo! News, news portal reports about RhB the longest train Guinness record.

## Future Activities

- Advertorial Lets Enjoy Tokyo featuring "Swisstainable" will be released 2 November (with event info GTF green challenge)



- HTML AD E-newsletter Travelco featuring "Swisstainable" will be released 22 November
- Swisstainable Present campaign on MyS.com will be launched 1 November
- GTF Green Challenge Day at Shinjuku Gyoen National Garden, Sustainable /SDGs event with Ministry of the Environment on 5 & 6 November
- Swissfair Oita with Sustainable /SDGs theme presenting our sustainable partners and strapa SCM-cheese, SWA -wine 19 November
- Rakuten targeting e-newsletter AD featuring legendary rail travel featuring Suzuki campaign partner ( STS/ JB/ RhB) will be released on 25 November

### **Interesting observations**

While masks are still worn in- and outside by 95% of the population, temperature measuring and mandatory hand sanitising at the entrance of buildings has become less. Travel advertising is back in full swing.



## 2. Active Markets

### KOREA

#### Market Situation

##### [Covid-19 Update]

- Barrier-free traveling overseas from Korea
- The current one-day post-entry COVID-19 PCR test requirement for travelers entering Korea will no longer be in effect starting October 1.
- The existing Covid-19 regulation in Korea as of October is only wearing masks at indoor environments.

##### [Economy]

The country's consumer prices rose 5.6 percent on-year in September, slowing from the previous month's 5.7 percent rise. To fight inflation, the central bank has hiked its policy interest eight times by a combined 2.5 percentage points since August last year. On an annual basis, gross domestic product (GDP) likely expanded 2.8%, according to the median forecast from 22 economists polled Oct. 20-24, down from 2.9% in the second quarter.

##### [Politics]

Korean government is co-hosting the first World Bio Summit to take place in Seoul, Republic of Korea, on 25 and 26 October 2022 with WHO.

#### Campaigning & Activation

##### Content development trip with social influencers

- Period: Sep 18th – 28th, 2022
- Partners : LLR (Pilatus), Schilthorn, Zermatt, Valais (Aletch Arena), Kandersteg, Adelboden, Briez, Locarno, St.Moritz, Appenzell
- 50 short video contents production for STKorea IG channel
- 25 social postings by 2 Influencers
- Social Influencers: @seosum (166K), @kingo1398 (153K)

#### KAM

##### STA 3rd Seminar

- Date: 22 Sep. 2022
- Venue: Swiss Embassy in Seoul



- Participants: 15 KAs (HanaTour, ModeTour, NaeilTor, etc)

- Contents: hiking, SPA, photo spots in CH

STE Korea 2022

- Period: 20, 21 Oct. 2022

- Venue: Four Seasons Hotel in Seoul

- Participants: 200 KAs, 20 Media, 20 Swiss partners (17 organizations)

- Program

Open workshop

One-to-one meetings

Dinner reception

Half-day networking program with KAs

STA Study trip

- Period: Oct. 22nd- 31st

- Participants: 12 KAs, 1 LH, 2 ST

- Destinations: Zurich, Zermatt, Valais, Interlaken, Jungfrauoch, Schilthorn, LLR (Rigi, Pilatus, Titlis, Luzern Navigation), BEX, etc

## KMM

Media newsletters to 650 journalists in Sep & Oct respectively

Media trip with Korea Broadcasting System shooting the TV variety show “Battle Trip”

- Period: Sep 27th – Oct 10th, 2022

- Partners: SaasSaas-Fee, Zermatt, Leukerbad, Aletch Arena

- 2 TV episodes (60min per each episode)

- Expected broadcasting date: Dec 10<sup>th</sup>, 17<sup>th</sup>, 2022

- Expected media contacts: 7M

## Interesting observations

[Outbound Travelers in Korea]

- No. of the airlines to European destinations has reached up to 12,640 in Sep 2022 which is at the





level of 46% in 2019.

- No. of the flight passengers to Europe in Sep 2022 reached to the level of 42% in Sep 2019.



## 2. Active Markets

### NORDICS

## Market Situation

### Economic Growth

Economic growth in the region will moderate this year and soften further in 2023. The positive effect of tight labor markets and strong wage growth should ease pressure exerted by higher interest rates and elevated inflation, while fears of a global slowdown bode ill for the external sector. Falling house prices, household debt levels and geopolitical tensions are key risks.

### Inflation Outlook

Regional inflation accelerated in the fall, amid intensifying price pressures in Denmark and Sweden, which more than offset moderating inflation in Finland, Iceland and Norway. Inflation in the region is set to gradually moderate during the remainder of the year and into 2023 due to tighter monetary policies.

## Campaigning & Activation

SE-DN, Digital Native X 4 weeks

Engadin

Engelberg

Valais

Zermatt

DK-Berlingske, Digital Native

Valais

SE-Åka Skidor, Advertorial

Davos Klosters

SE- Bicycling, Advertorial

Davos Klosters + 100% Women

SCIB:

Zürich Advertorial in Realtid; Online Financial Magazine. Statistics TBA

Advertorial about unusual meeting venues in print magazine Allt om Konferens (300.000 copies)

also featured in Kick off magazine 16.000 readers



## KAM

### Trade

- Site Inspection, Lucerne & Ticino, 7-10/9  
Alabtros, 1 pax
- Site Inspection, Grindelwald & Mürren, 18-20/9  
Ski Unlimited, 1 pax
- Fam Trip, Ticino/Lugano - ATWS, 2-6/10  
EverTrek, 1 pax
- Fam Trip, Lucerne & Jungfrau, 3-18/10  
Trivselreiser, 1 pax
- Site Inspection, Ticino - Monte Generosa, 29/10  
Olympia Travel, 2 pax
- STML, Gstaad, 4-6/9  
Peacock Travel, 1 pax
- SE - Swiss Residence, 18/10

B2C Ski Event in collaboration with Zermatt and travel agency Konfido at Swiss Residence. Guests at the residence were Konfido's VIP customers, mainly members of the community Skiers Accredited.

Mammut was there to showcase their avalanche backpacks and The Mountain Studio presented its latest outdoor collection.

56 ski enthusiasts participated in the event.

### SCIB

- Siteinspection Ophelix norway , Zürich 2 pax
- Siteinspection Reisebyrået Norway, Grindelwald 1 pax
- Siteinspection FCM, Denmark, Geneva 1 pax
- Hybrid breakfast meeting with Lucerne in Helsinki, 7 guest
- Sales calls and B2B workshop mötesmekka in Copenhagen, 15 client meetings
- Newsletters Villars to SCIB Database 1300 contacts

## KMM

Press trips:



SE-Vagabond, Per Andersson + Jonas Gratzer

Basel, Lucerne, Andermatt, Zermatt

SE-Icon Magazine, Dan Kullberg

Zermatt

SE-Influencer Fanny Josefin + Patrik Widell

Engelberg

SE-Yvonne Gull, Miss VEGO, int. press trip "Swiss Veggie day"

SE-influencer Hildur Karlsson & Malou Petersson

Grindelwald

DK-Politiken, Oliver Reich, int. press trip "RhB world record attempt"

DK-Frank & Anita Juel, Vagabond

Lucerne + Engelberg

## Future Activities

Sthlm Days 24-25/11



## 2. Active Markets

### POLAND

#### Market Situation

##### Politics

In a worst case scenario, Poland could miss EU funds of up to 76 billion €. The money from the so called cohesion fund could still be unfrozen, but the status quo according to the EU commission is that Poland doesn't comply with the basic standards of the EU charta of basic rights. The main reason for the conflict is the unwillingness of the far right Polish government to comply with EU demands concerning an independent Justice system.

According to new surveys from several opinion poll firms, the ruling Law and Justice party would lose their power if the parliamentary elections were being held now. The center left opposition parties gather over 50 percent of the votes right now, the polls find. The regular time for the next elections is one year from now.

##### Economics

The inflation rate in Poland climbed to 17,2 per cent year on year in September, with average salaries in the private sector rising 14,5 per cent at the same time - almost but not entirely offsetting the price hikes for employees. The situation is looking worse for self-employed Poles, as well as many SMEs

The unemployment rate stands at just 4,8 per cent with many employers having trouble finding qualified staff for their companies.

Poland is still the EU country most affected by the unprovoked Russian aggression and war crimes in Ukraine. According to the latest figures from the Polish Border Control agency, since the start of the war, there were around 7 million border crossings from the Ukraine into Poland and ca. 5 million in the opposite direction. It is estimated that at least 1,5 million Ukrainians found refuge in Poland, with another 1,35 million Ukrainians living in Poland already before the war.

#### Campaigning & Activation

- Margaret on e-GToS. Singer, composer, music awards winner

Active on Instagram (824'000 followers, TikTok 542'000)

In cooperation with Agora – publishing house and events organiser

Content gathered during her trip on eGToS in June used at festivals (2 big events, 40'000 participants total)

Live and online streaming, audience 15'000, ST branding, FB activities: 410'000

- Advertorial in Polityka for Pilatus. 2 pages advertorial in a weekly magazine *Polityka*, September 21st issue. Content published also online on [polityka.pl](http://polityka.pl)

Focus on Pilatus. Circulation: 130'000, reach 470'000

- Trail running trip and an article in ULTRA magazin for runners.



Bi-monthly, edition Sept/Oct. Focus on event „Crossing Switzerland” and Via Alpina. 8 pages advertorial written from the participants` perspective – one of the editors took part and finished the race! Followed by podcast promoting the issue, 8'000 copies. Online activities in SoMe

- GToS display campaign, 28th August – 30th September, Mailing

Display creations. Our eGuide Grand Tour and our application promoted. Reach 3'200'000

- Branding with wyborcza.pl

16th – 17th September. Focus on autumn in Switzerland. Link to our autumn MyS landing page. Reach: 1'850'000, 5'000 clicks

- Online with wyborcza.pl. Content created during visit in Central Switzerland in September. 2 videos published on *wyborcza.pl*. Picture galery with 27 shots and short comments published photos

<https://wyborcza.pl/10,82983,28982708,lekcja-jodlowania-z-widokiem-na-jezioro-czterech-kantonow-co.html>

<https://wyborcza.pl/10,82983,29015617,fondue-szkockie-krowy-i-noc-za-kratkami-subiektywny-przewodnik.html>

- Activities promotion STP special offer. 19<sup>th</sup> September – 30<sup>th</sup> October. Paid posts, B2C, media and trade newsletter. Organic posts on our FB page. Reach over 500'000 so far

- SoMe activities for Pilatus. Paid campaign in September

Hiking and perfect views. Impressions almost 1'200'000

- SoMe Activities on ST FB. Posts promoted on our ST Facebook page

September – October. Different autumn topic, video, GToS

Average monthly reach 800'000

Facebook stories - regular activities every week new topic with links to MyS

- Monthly NLs

B2C:

September (Autumn ideas, 4 day STP promo, Nature SPA, Route 1291, Run the Swiss City, Hiking on Pilatus, Swisstainable Veggie Day, Brochures)

October (Autumn hiking, STP promo, Swiss Museums, Xmas market on Pilatus, Swiss cities, Swisstainable - cities and nature)

B2B

Sept 4 Day STP, autumn ideas, nature SPA, Veggie Day

Oct STP promo, Swisstainable Travel Academy, autumn

KMM

Sept Autumn ideas, STP, Nature SPA, 100% women, Run the swiss city, barrier free travel

Oct, STP, Longest train record, Swisstainable Academy, oldest restaurant - Hiltl



## KAM

- Middle European Workshop in Mürren, 28th September – 2nd October. 23 KAM from Poland, also participants from Czech Republic. Hosted by Schilthorn Cableways, our market partner. 1 day networking with Swiss partners. Post Convention Tours

## KMM

- Influencer trip with LGBT+ focus, 19th – 28th August. Female couple`s trip to Switzerland with video support, 4 pax (@way.of.blonde and @maschinen)

Focus on GToS, 9 days in Switzerland, travelling by train, visiting cities, hiking. Instagram, TikTok and Facebook activities – reach 3'920'000

Youtube video 13'000 views.

- eGToS with influencers Marcin and Ada, 2 pax, 25<sup>th</sup> – 30<sup>th</sup> August, Marcin @marcinkvcinski and Ada @lenarczyk.a from the *Vlog 646*, Online SoMe (IG) activities of participants, cooperation with Europcar, Instagram and TikTok activities. Reach over 920'000

- Hiking photographers trip, 5 pax, 29<sup>th</sup> August – 2<sup>nd</sup> September. Active hikers and photographers in Pilatus and Kandersteg Adelboden Lenk region

Hiking and photo shooting. Posts during and after return. Reach of 790'000

- Contest winner`s trip with Gazeta Wyborcza, 7 pax, 15<sup>th</sup> – 18<sup>th</sup> September

Central Switzerland: Lucerne, Rigi and Stanserhorn, Contest winners travelling with video support from daily *Gazeta Wyborcza*. Content published on spot via SoMe, 2 x videos for *wyborcza.pl* Figures tbd.

- Trail running activities in Engelberg, 3 pax, 21<sup>st</sup> – 24<sup>th</sup> September, "Cirque Series" run for the first time in Europe - in Engelberg, Cross SoMe activities with the Polish trail run "PUT – Pogorze Ultra Trail", 1 running influencer, 1 winner of PUT and 1 influencer/photographer. Content during and after return published in SoMe (Instagram of participants and running society). Reach: around 350'000

- Trail running influencer trip with ON, 9 pax incl. Polish brand ambassadors – runners, trail runners, 22<sup>nd</sup> – 27<sup>th</sup> September. Visit in ON-running premises in Zurich. Run the Swiss City - Zurich. Trail Running in Engadin, 4 days. Cooperation with Eurotrek. SoMe activities on participants and ON-running channels in Poland

- Bloggers culinary trip by ebike. 5 pax, 23<sup>rd</sup> – 27<sup>th</sup> September. Travel, lifestyle and food bloggers. Culinary and biking mix. Fribourg Region with cheese and chocolate. Cooperation with Eurotrek. Instagram, posts, Facebook and blog communication during and after return. Estimated reach so far 1'400'000

- Mini int. trip Veggie Day, 29<sup>th</sup> September – 2<sup>nd</sup> October. Participation of PL blogger @Rozkoszny with 289'000 followers on IG and well know in culinary world. Instastories during the trip with reach of 1'360'000. Interesting facts and links in the stories, saved for further views

- Photographers influencer trip in Ticino. 6 pax, 2<sup>nd</sup> – 9<sup>th</sup> October. Focus on Ticino: city, valley and mountains. Active outdoor, nature photographers



NG associated photographer as guide. Content used in SoMe on spot, after return and also during different events after return. Sponsored posts after return. Reach so far 970'000

## Future Activities

Business Plans with TO's – winter offers (Nekera, Taksidi, SnowShow, Wild Holiday, Interhome, SnowTrex)  
Recovery activities for winter promotion  
Activities with Snowtrex  
Influencer trip to Davos in December  
Online activities promoting winter  
ST wall calendar  
Winter media meeting  
Webinar with agent's of Nekera  
NL's  
Activities in SoMe for partners (promoting winter)





## 2. Active Markets

### RUSSIA

#### Market Situation

Russia's Ministry of Economic Development expects that in 2022 and 2023 the country's economy will shrink by 4.2 and 2.7 percent respectively, and only in 2024 will it resume growth (by 3.7 percent). There will likely be no economic catastrophe this year or the next. Instead, "negative growth" is expected to continue, which will probably affect almost all sectors of the economy, including the extraction of raw materials. The economy will likely become more dysfunctional due to the acute shortage of investment and lack of new technologies.

Outbound travel industry functions according to the availability of flights and destinations. Schengen visas for Russian tourists continue to be issued by Austria, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Malta, Portugal, Slovenia, Spain, Sweden and Switzerland. The processing time has increased from 10 to 15 days, in some cases up to 45 days. And the visa fee for adults has been increased to 80 euros, for children to 40 euros.

Switzerland Tourism does not conduct any marketing activity in Russia.



## 2. Active Markets

### SOUTH EAST ASIA

#### Market Situation

ST Southeast Asia has launched its first Autumn campaign across the region with special focus on Singapore and Thailand.

The market is recovering relatively well, and should reach 70% of recovery by the end of the year. (Overnights Jan-Aug, 2022 compared to 2019: SEA: -26.7%, in absolute numbers: 277KON vs. 378KON)

However, the recovery pace is uneven among SEA markets, with Singapore being back to growth (+6.8%), followed by Malaysia (-22.2%), where travellers do not need a visa to enter Schengen states.

Among the visa countries, Philippines recover the best with -36.3%, but it is the smallest market in sheer size (18KON). Then Indonesia (-40.8%) and Thailand

(-48.8%) are both lagging behind. The main reasons are 1. the spring travel peak, resp. Songkran and Lebaran, have been missed out due to the many restrictions in place. Also, the demand for Schengen visa slots is higher than the supply, hindering agents to sell in full confidence.

Finally, the Summer season taken alone shows encouraging signs of speedy recovery with only -8.1% for all SEA compared to 2019 (May-Aug).

#### Best practice competitors

In the regions, Switzerland is the most visible European tourism destination, followed by Spain, which is also very active with Key Accounts.

The reopening of some popular Asia destinations (Hong Kong, Taiwan, Japan) will shrink the market share of Europe among overall outbound tourism.

In particular, we expect Snow Sports enthusiasts to rush towards Japan and Korea. These two destinations position strongly on winter tourism in Southeast Asia.

#### Campaigning & Activation

- SG: 2 Sep: 100% Women Celebration and Sharing Event
- TH: 14 Sep: Inauguration of King Rama IX bust in Lausanne in presence of Thai Royal HRH Princess Sirindhorn
- SEA: Autumn content distribution with World Travel Magazine, 5 articles for each autumn partner
- STS: HoneyKid School Fair with EU Holidays with 400 participants

#### KAM



- SG: 6-9 Sep: ILTM Asia Pacific with 11 Swiss partners and 300 buyers
  - SEA: 20 Sep: Autumn Trade Webinar with 167 trade participants
  - SEA: 24 Sep-2 Oct: Autumn Mixed Fam Trip with 4 key accounts
  - SEA: 3-9 Sep: STML participation with 2 Key Accounts
  - SG: 14 - 25 Sep: Fam Trip for Cycling tours in Summer 23 with Swiss DMC out & ABOUT.
  - STS: 19 Sep-31 Oct: STP tactical promotion campaign with Klook focus on TH and SG
  - SCIB: 27-30 Sep: Destination Wedding Event in Bali with 500 wedding planners
  - SCIB: 12-16 Sep: Roadshow with Zurich, Wedding and STS to BKK, JKT, KUL
  - SEA: 23-29 Oct: Market Development Tour with 20 Swiss partners and 150 buyers visited in Manila, Saigon, Penang, Surabaya
  - PH: 24 Oct: Inauguration of ST Manila Antenna in presence of HE Ambassador Gaschen, ST Head Market East Simon Bosshart.
- SCIB carried out business:
- Sep: 2846 overnights for a turnover of 948KCHF

## KMM

- SG: Coveragepage Expat Living SG with 100% Women
- SEA: TTG Asia story "Golden Autumn in Switzerland"
- SEA: 26 Sep: Online Media Briefing with 18 media
- SEA: 27 Sep-4 Oct: Autumn Mixed Media Trip with 6 media
- STS: 16 - 21 Sep: Behind the scenes Int'l Media Trip with 2 media from SEA
- SEA: 17 - 18 Oct: ST Participation to IMM Asia 2022, a workshop with travel media
- SG: 21 Oct: ST participation to ATTA panel discussion and lunch reception during ITB Asia in Singapore
- SG: 29 Oct - 2 Nov: Media Trip with Strait Times Autumn and Nature Spa

## Future Activities

- SEA: 3-5 November: Martin Nydegger's visit to BKK and SG, winter campaign launch
- SEA: 5-6 Nov STEAM Planning 2023
- MY: Nov-Dec: Winter campaign with STS, OOH and online activations
- BKK: 21-22 Nov: Visa Workshop BKK
- SCIB: Asia Trophy early December



## Interesting observations

In the regions, Switzerland is the most visible European tourism destination, followed by Spain, which is also very active with Key Accounts.

The reopening of some popular Asia destinations (Hong Kong, Taiwan, Japan) will shrink the market share of Europe among overall outbound tourism.

In particular, we expect Snow Sports enthusiasts to rush towards Japan and Korea. These two destinations position strongly on winter tourism in Southeast Asia.



## 2. Active Markets

### SPAIN

#### Market Situation

According to Exceltur, a tourism association, the eagerness to travel this summer has reached its peak exceeding all forecasts for this season. Spain ends the third quarter with an increase of 2.7% in tourism GDP, above the figure reached in the same period of 2019. Looking ahead to the final months of the year and despite the economic uncertainty, the sector discards a drop in tourism activity but recognizes that growth will slow down compared to previous quarters.

For the first time the Spanish market managed to show a growth in August 2022 in Swiss hotels and for the first week of December we expect a clear increase due to two festivities in the country and the great interest in our Christmas markets.

#### Campaigning & Activation

Promoting the Nature Spa product through a DEM with City Confidential, an online magazine dedicated to women only with over 180'000 active subscribers. Additionally numerous SoMe posts reaching an audience of 469'325 ladies.

2 pages advertorial about Nature Spa in Cuepomenta - a magazine for wellbeing lovers reaching over 150'000 marketing contacts

#### KAM

International **workshop in Bilbao** with the Spanish Confederation of travel agencies. 50 exhibitors in total from 6 int. travel destinations. 100 agents followed the invitation.

Exclusive campaign with B The Travel Brand and Zurich Tourism. Various sales oriented activities including a radio interview and a B2B presentation in Barcelona.

#### KMM

##### Media events

21.09. Swiss Travel System & SGV Lake Lucerne in Barcelona with 6 journalists in a boat

04.10 Basel in Barcelona with 11 journalists learning how to prepare "Leckerly"

##### Mediatrips:

Influencertrip @elviajedetuvida "Majo onda train" to Zermatt, Aletsch Arena, Mürren, Luzern and Rigi, 2.-9.9

Piedra de Toque Radio program to Vaud, 9.-12.9

Viajes National Geographic to Zürich and Geneva, 15.-19.9



Q Travel and Barcelonautas TV to Zürich and GTT: Chur, St.Moritz, Zermatt, Lugano and Luzern, 10.-20.9

20 Minutos, Vinosycaminos.com and Tugranviaje.com to Geneva, 22.-24.9

El País/Icon Magazine to Basel, 14.-16.10

Mía Magazine, Lavanguardia.com and Tendencias.com to Zürich, 21.-23.10

Revista Viajar to Intl. Mediatrip “RhB Swiss Records” to Lucerne, Davos, Chur and St.Moritz, 23.-30.10

**Top Coverage:**

Radioprogram “Fem Turisme”, Interview Cris Gallardo, 125’000 media contacts

20min.es, online daily newspaper, “El tren más empinado del mundo”, 586’000 media contacts

Elpais.com, online daily newspaper, “Delicias de verano en la suiza Jungfrau”, 1’419’250 media contacts

Elpais.com, online daily newspaper, “24 horas en Coira” 1’419’250 media contacts

20min.es, online daily newspaper, “El refugio de Federer, una de las zonas más increíbles de Suiza”, 586’000 media contacts

Libertaddigital.es, online daily newspaper, “Montañas, lagos, quesos, pueblos y más maravillas en la Gran Ruta de Suiza”, 450’000 media contacts

Radio Libertad, historic travel radio program “Viajes a la historia: Lucerna”, 80’000 media contacts

Libertaddigital.es, online daily newspaper, “Un paseo por Neuchâtel”, 450’000 media contacts

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

Libertaddigital.es, online daily newspaper, “Picasso El Greco, así es la gran exposición en Basilea”, 450’000 media contacts

Tendencias.com, online leisure & travel magazine, “Berna, la ciudad con las fuentes más curiosas del mundo”, 75’000 media contacts

Radioprogram “Fem Turisme”, Interview Elena Affeltranger & Basel Tourism, 125’000 media contacts

Icon Magazine “Nietsche estuve aquí”, 364’777 media contacts

Elpais.com, online daily newspaper, “El hotel en el que solo se puede hablar por el móvil desde unas cabinas” 1’419’250 media contacts

El País Semanal, “Turismo. En este hotel, cuidado con el teléfono”, 579’232 media contacts

Descubrir.com, “Descubriendo Friburgo el capricho medieval de Suiza”, 535’000 media contacts

Publico\_Viajes, “Los secretos del queso gruyer suizo”, 750’000 media contacts

RNE 1000 lugares para viajar, “Alpage y Desalpe: la trashumancia suiza en Friburgo”, 100’000 media contacts

RNE Viajes a Ítaca, “Ciudades europeas: Friburgo y Murten”, 100’000 media contacts



RNE 4 Son cuatro días: “En tren per Suïssa”, 150’000 media contacts

Viajes National Geographic Online, “Suiza intentará batir el récord del tren de pasajeros más largo del mundo”, 417’601 media contacts

Viajar.es, “Otoño en los Alpes Suizos”, 127’152

Radio Cope Programa Tiramillas, “Basilea, capital del arte contemporáneo”, 50’000 media contacts

Radio Cope Programa Tiramillas, “Swiss Travel System, una Buena propuesta para conocer Suiza”, 50’000 media contacts

Radio Euskadi 8 dias/7 noches Piedra de toque “Ruta por el lago Lemán” 382’000 media contacts

Eldiario.es & blog Piedra de toque, “Otoño junto al lago Lemán”, 175’000 media contacts

**Total: 11’415’512 media contacts**

## Future Activities

- Digital winter campaign
- Cities campaign with Time Out
- Geneva sales campaign with Atrapalo
- Bern xmas markets at Viajes National Geographic
- Content Creator in Basel xmas market
- Special campaign with Torrijos and Zurich
- Promo Ski - Heidi Moderno @ La Vanguardia
- Distribution ST magazine White