



Market Updates

November/December 2022

Editorial

Dear Partners,

Despite the many uncertainties and challenges, that showed up during 2022, the year nevertheless ended with a bright spot on the horizon: with China's lift of all CoVid related restrictions, the last of our markets has decided to focus on recovery. And although the energy crisis, rising prices, and the dangers of inflation and recession remain in the air, global traveling seems to be very resilient, and the hunger for travel is unbound.

Russia remains the only market, where we have come to a full stop with our marketing activities, and our local team being involved with projects outside of Russia, and supportive roles for other teams.

Over 600 marketing activities have been executed by our worldwide market teams, very often with your strong support, closing another very intense and effective recovery marketing year.

Kind regards,

Simon Bosshart
Head Markets East



1. Priority Markets

BENELUX

Market Situation

General situation focusing on Economic Outlook for 2023:

Netherlands: Following a 4.3% expansion in 2022, economic growth is projected to slow to 0.8% in 2023. Inflation is expected to moderate to 3.9% by the end of 2024, after peaking at 15.4% in the fourth quarter of 2022. Private consumption is projected to weaken in the short term, but will gradually strengthen, aided by government support measures and welfare adjustments.

Belgium: GDP growth is projected to slow considerably from 2.9% in 2022 to 0.5% in 2023 in the face of high inflation and heightened uncertainty, before picking up to 1.1% in 2024. Private consumption will remain weak until mid-2023 despite the automatic indexation of wages, which supports household purchasing power.

Luxembourg's economic growth is set to slow to 1.5% in 2023, before picking up again in 2024. Activity has slowed due to broadening inflationary pressures, falling manufacturing activity, and the uncertain outlook on the back of the war. Financial services growth will slow in 2023 and high interest rates will delay business investment and housing purchases.

Best practice competitors

TUI launched its weekly Winter Ski train to Austria. Running from December till March. ST BeNeLux analysis the evolution, results and possible future options for Switzerland.

Campaigning & Activation

Meetings

Netherlands

- Meeting Magazine eNewsletter 01/11: Villars Resort Group.
- Dedicated eNewsletter Meeting Magazine 15/11: Quiz The Dolder.
- eNewsletter sent to SCIB Database 15/11: Quiz The Dolder.
- Conference Matters eNewsletter 06/12: Innovation & Technology.
- eNewsletter sent to SCIB Database 20/12: Happy Holidays.

Belgium & Luxembourg:

- eNewsletter sent to SCIB Database (1'586 contacts): 17/11: Discover your special venue in CH,
- eNewsletter sent to SCIB Database (1'590 contacts): 13/12: Winter news from Switzerland
- eNewsletter sent by Boardroom magazine to 10'000 about Basel, meet Basel, city of congresses & fairs and link to online article.



Print:

- Boardroom Magazine: 2 pages about Basel: Meet Basel, City of congresses & fairs, 7'500 ex
- Rendezvenement: 2 pages about: La Suisse est prête à accueillir votre équipe. Zwitserland is klaar om uw team te ontvangen. Swisstainable & bleisure. 5'000 ex, circ. 11'050

Winter

Netherlands

- Winter Snowplaza: Exklusive Key Partner Winter promo VWP (8 Wallis Destinationen) + B2C Raclette Event
- Wintersportgids: exclusive winter promotion with Lucerne
- de Bijenkorf ice rink in Rotterdam + exclusive Event
- Bright8: Social Media Campaign winter (Recovery)
- VDX: Digital Campaign winter (Recovery)
- Bever Winter Sports Safari with Bern, Graubünden + Wallis
- NSkiV exclusive digital Campaign with Alpes Vaudoises

Belgium & Luxembourg:

- Kachen: Luxembourg's only food & lifestyle magazine, exclusive campaign with Made in Bern: print + digital sponsored content

Summer

Netherlands

- Swisstainable Interactive Campaign with Honeyguides + Columbus Travel: Phase 3 with print for Ticino, Valais

KAM

Meetings

Netherlands

- IBTM 2022.
- MPI Neuromarketing 12/12.
- In company study trip Schiphol travel International 12/11-13/11 Zurich.
- In company study trip ATPI 25/11 Zurich.
- In company study trip E-Business 26/11-27/11 Lucerne.
- In company study trip VCK Travel 14/12 Zurich.



Belgium

- Lufthansa Group MICE workshop with 70 participants: 22/11
- IBTM Barcelona: 50 appointments
- BBT speed date workshop with 5 Swiss partners, 115 participants and 55 contacts: 19/12

KAM

- KAM Study Trip Wallis with 12 Participants

KMM

Media Trips

Individual Trips:

- TV production VTM Droomreis (BE): Lucerne Region
- TV production RTL4 All you need is Love (NL): Zermatt
- Elle Magazine (B): Verbier
- Krant van West-Vlaanderen (B): Davos
- Prospection trip VTM 'Over de grens' (B): Graubünden

Group Trips:

- Int. Media Trip RhB record: Reizen-met-de-trein.nl

Media Top Coverages

- VAB Magazine (BE): Anakolodge, Wallis
- Knack Weekend & Le Vif Weekend (BE): Grand Train Tour of Switzerland
- National Geographic Traveler (NL): Engadin
- Reisachtig.com (NL): Swisstainable veggie day
- Hoogtelijn (NL): 1/ Keschtrek Graubünden 2/ Jungfrau Region
- Fiets Actief (NL): Alpine Circle Graubünden
- Camper Reis Magazine (NL): Wallis & Jungfrau Region
- Bergen Magazine (NL): e-GToS

Media Events

Media & Trade Networking Event in Luxembourg with Ascona-Locarno Turismo & Benvenuti Hotels



Media Newsletter

- Winternews & highlights Ascona-Locarno/Benvenuti Hotels sent to Luxemburger contacts
- Fondue experiences sent to all Benelux media contacts

Meetings

Netherlands

- High profile article Andermatt & Lucerne study trip 10'000 copies.

Future Activities

Meeting Netherlands: Interaction Fair AMEX 31/01-02/02 Amsterdam.

Winter

- de Bijenkorf ice rink in Rotterdam + exclusive Event
- Winter Snowplaza: Exklusive Key Partner Winter promo VWP (8 Wallis Destinationen)
- Wintersportgids: exclusive winter promotion with Lucerne

Interesting observations

TUI launched it's weekly Winter Ski train to Austria. Running from December till March. ST BeNeLux analysis the evolution, results and possible future options for Switzerland.



1. Priority Markets

FRANCE

Market Situation

Economic activity slowed down significantly in the second half of 2022. In 2023 due to important supply disruptions and higher inflation triggered by the energy crisis, it is expected to slow down even further. The rise in inflation is set to be sizeable and persistent (5.8%, 4.4% and 2.2% in 2022, 2023 and 2024), although largely attenuated by the measures adopted to mitigate the impact of high energy prices.

Source: European Commission

For France, 2022 as a tourism season is synonymous with a return to normal for hotels and touristic service providers. The hotel industry is back to its pre-crisis level.

Campaigning & Activation

SCIB :

- 9 articles de blog publiés, 23'556 pages vues sur la période sur l'ensemble du blog (il y en a encore 2 articles prévus et il manque le visitorat des 8 derniers jours de décembre).

- e-news " Retrospective 2022 : une année riche en nouveautés pour la Suisse !" envoyée à 2'331 contacts --> taux d'ouverture : 30.5%, ouvertures uniques : 706, taux de clic : 2.67%

- Campagne sur LinkedIn en décembre avec 2 axes : promotion film campagne recovery central et teaser contenu pour blog (rapport de campagne en cours)

- E-mailing avec Call to Action pour télécharger notre document "50 idées & lieux dépaysants en Suisse pour des événements d'entreprises" à travers 2 bases de données pro : MyEventNetwork & ActaMedia. Taux d'ouverture resp. 25.8% et 18.68 %. En tout (seulement) 38 téléchargements

HIVER :

- Le Routard : partenariat avec la marque Routard et les KeyPartner hiver (Valais, Vaud, Hotels Cooperation, STS) en print et digital. Print : cahier 5 pages sous forme de carnet de voyage. Tirage : 100k exemplaires - 250k lecteurs estimés. Parution : novembre. En digital : mise en ligne d'un espace dédié avec un contenu/séction par partenaire. Médiatisation de l'espace dédié via les réseaux sociaux du routard.com, une campagne display et des push éditoriaux. 30k visites et 808k reach prévu. Diffusion : novembre 22 - février 23.

- Guide des Stations, Equipe : partenariat en print et digital. Print : publiereportage 5 pages dédié entièrement au Valais (KeyPartner). 200k exemplaires pour 3M de lecteurs. Digital : relai du contenu sur le site equipe.com et le supplément Guide des Stations avec un article native. 3.5M de visites estimées sur l'article native. Print et digital : novembre.

- Influence : envoi d'un influenceur @loickohlanta au voyage influence à Crans-Montana pour mettre en avant l'offre Ride&Slide et relayer le TopSpotAward. Début décembre. 1.5M vues (reels, stories, post). Insta et TikTok.



- Campagnes digitales : campagne notoriété (impressions, CPM) et performances (clics, CPC) sur un ensemble de solutions. Display en programmation avec Sojern, en site à site avec lefigaro, skiinfo, skipass, social display sur Meta et le groupe leMonde et avec Outbrain. Native standard avec outbrain. Objectifs clics et impressions.

SWISS CITIES :

- Figaro et Madame Figaro : publiereportages en simples pages sur la ville de Bâle. 1 publiereportage par magazine. contenu et iconographie adapté. Parution en novembre. 750k exemplaires - 2.3M reach.

- Campagne display avec Sojern - display multi format programmatique - et native avec Outbrain. Objectif visibilité et trafic. 150M de reach.

- Campagne digitale avec la ville de Lausanne en novembre pour mettre en avant la période des Fêtes. Présence sur snCF-connect et le figaro en display, en social display sur le groupe leMonde, avec Invibes en native in read et avec outbrain pour la performance. En complément partenariat avec TimeOut avec un article publié sur le site et relayé sur les réseaux sociaux de timeout. 38M de reach sur la campagne.

SUISSE PERCHEE :

-Soirée d'ouverture de notre rooftop hivernal aux couleurs de la Suisse à Paris Porte de Versailles le 01.12.2022

-Présence du 01.12.2022 au 19.03.2022

-Articles online et posts social media sur Timeout(250K impressions), Paris Secret(3.9M Impressions), Le Bonbon(360K impressions)

-1 full page print dans Telerama Sortir

EVENEMENT ST-CONSULAT SUISSE A MONACO

Organisation de la partie repas en partenariat avec le Consulat Suisse. 50 invités ont eu la possibilité de déguster une raclette et ont eu l'opportunité de repartir avec une brochure de la Suisse

KAM

SCIB :

- Participation au salon IBTM Barcelone du 29 novembre au 1er décembre

17 rdv pris en avance et participation au déjeuner cocktail Partance

--> au final 15 rdv dont quelques étrangers, 15 contacts lors du cocktail Partance. 10 nouveaux contacts, beaucoup d'intérêt pour le côté RSE et destination proche et accessible en train depuis Paris.

- Eductour Villars sur 3 jours avec 6 agences et une journaliste Mice, très bons retours

Loisirs:

- Roadshow KMM/KAM en région Marseillaise pour rencontrer des journalistes et des TOs régionaux.



- présentation des Trains suisses lors d'une conférence animée par l'agence de voyage partenaires "Discovery Train". Public: un 40e de clients/contacts de l'Agence. Lieu: Musée d'Arts de Nantes à l'occasion de l'expo temporaire "Voyage en Train"

- participation au salon SiTV à Colmar avec l'agence de voyage Formitour dans l'optique d'apporter des informations touristiques sur la Suisse lors de la mise en avant de leur offre spéciale de voyage sur les trains suisses aux visiteurs du salon

KMM

- Emission Sud Radio " Le Monde à Découvrir" pour mettre en avant l'hiver Suisse avec la participation du Valais. 50 min d'émission sur la Suisse

- Roadshow KMM/KAM en région Marseillaise pour rencontrer des journalistes et des TOs régionaux.

- Evènement média le 8 décembre à "Suisse Perchée" le restaurant éphémère de ST pour l'hiver 2022-2023. 23 journalistes présent pour écouter la destination Gstaad et Made in Bern avant de découvrir les spécialités culinaires suisses revisitées et la terrasse "chalets" du Perchoir.

- Planification de nombreux voyages de presse hiver courant janvier (une vingtaine de prévues), TV, quotidiens nationaux et régionaux etc.

- Envoi d'une Newsletter dédiée pour la canton de Berne suite à l'évènement média.

Future Activities

KMM:

- de nombreux voyage de presse hiver

KAM Leisure

- Salon Passion Voyage de Brives-la-Gaillarde en collaboration avec le réseau d'agence Fitour

- STMS Zermatt

- Eductour en Suisse avec le TO Solotour



1. Priority Markets

GCC

Market Situation

The GCCs are still in an excellent position, mainly due to the high oil and gas prices. The Qatar World Cup added incremental momentum to the booming economy. Not only Qatar profited but especially the UAE with many people staying there while visiting the matches in Qatar. Furthermore, first mixed public viewing events in KSA (and their win against the later winner Argentina) were supporting Saudi Vision 2030 very much which emphasizes on changes within the society as well - not just economically. In the UAE an additional influx of Russians from Europe/Switzerland and Russia result in an 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.

Campaigning & Activation

- Presence at Club Suisse. World Cup House of Switzerland of PRS from 20NOV-18DEC. Swisstainable exhibition recycled from Pop-up House of Switzerland in Milano. 5 partners (Geneva, Montreux Riviera, Zurich and Interlaken/MadeinBern as well as STS) exhibited 42 Swisstainable artefacts. Tourism spots of partners were broadcasted before and after every world cup game at Club Suisse. In addition: VIP event including journalists with 65 participants at Club Suisse. Social media campaign. Media Campaign.
- Health campaign editorials in Sayidati, most popular family/women magazine KSA. Total 1.5Mio contacts
- Digital campaigns on health (1.6mio contacts) and on Winter (1Mio contacts) and last Expo part (SWISS) 4.4Mio contacts.
- Follow up on Saudi Health Mission: Visit of the referral center in Riyadh, Ministry of Health.
- Cooperation with the Emirati Wintersport Federation and UAE Skiers. Sponsoring of all FIS competitions in Ski Dubai including BIBs, logos, celebration wall and winner trips to Davos and Interlaken.

KAM

- STE, 12-19NOV22. Roadshow with 8 events in 5 GCC countries. 28 Sales calls, 750 agents met with 18 Swiss partner.

KMM

- Winter Media Release in the UAE, 8 articles around 1mio contacts. Focus on winter partner Interlaken and Davos
- Club Suisse Media Campaign. 10 articles, 556550 contacts



Future Activities

- Race To Switzerland from 28JAN-4FEB with 18 Swiss partners in all GCC countries. Meeting around 500 travel agents.
- 100% women cycling. Launch on 8March (International Womens Day)together with Wolfi (biggest cycling store chain in the UAE and UAE Team Emirates Women team.)
- Launch of new Swisstainable guides as well as luxury and family brochures. All brochures are Arabic/English and will be distributed digitally as well.
- Roadshow in the UAE together with the Embassy and other Swiss Institutions from 27FEB-3MAR celebrating 50 years of bilateral relations (UAE-Switzerland). Focus on Youth and Sustainability/Swisstainable.
- Winter Influencer Trip with Nael and Wael to St. Moritz, Interlaken and Andermatt. 5-12JAN.

Interesting observations

- Having now many very affluent Russians in the UAE, these become now a targeted mass of consumers, eventually for the travel business as well.



1. Priority Markets

GERMANY

Market Situation

Trade

Der touristische Vertriebsklima-Index, den die Unternehmensberatung Dr. Fried & Partner für Deutschland ermittelt zeigt sich im deutschen Reisevertrieb zum Jahrendende erneut leicht optimistisch. Im Jahresverlauf verdeutlicht der Touristische Vertriebsklima-Index, welche Herausforderungen durch die Nachwirkungen der Corona Pandemie 2022 für den Reisevertrieb und die gesamte Reisebranche weiterhin zu bewältigen sind. Zu Jahresbeginn liess sich eine positive Tendenz erkennen und bis zur Mitte des Jahres stieg der Touristische Vertriebsklima-Index auf seinen höchsten Wert seit Beginn der Erhebung im Jahr 2005. Nach dieser starken ersten Jahreshälfte folgte ein Einbruch im dritten Quartal. Zum Jahresende zeigen sowohl die Bewertung der aktuellen Lage als auch die Einschätzung der zukünftigen Situation wieder einen Aufwärtstrend.

Mit der Auswertung der November-Umsätze zieht Travel Data & Analytics (TDA) Ende Dezember 2022 eine Bilanz für den ersten Monat des neuen Touristikjahres. Die Umsatzeingänge für Winterurlaube lagen im November 27 Prozent über dem Vormonat und auch deutlich über den Novembereingängen im Vor-Corona-Jahr 2019. Damit verbessert sich die Bilanz der Wintersaison zum Vormonat um acht Prozentpunkte auf ein Minus von 19 Prozent zum aktuellen Buchungsstand. Nun rückt der Sommerurlaub in den Fokus der Deutschen. Mit 48 Prozent entfällt fast die Hälfte des Buchungsumsatzes im November 2022 bereits auf Sommerurlaube 2023. Sowohl umsatzanteilig und mehr noch in Bezug auf das Umsatzvolumen bleiben die Sommerurlaubsbuchungen jedoch deutlich unter dem Niveau von 2019. Dass solch ein Rückstand grundsätzlich aufholbar ist, hat die vergangene Sommersaison 2022 unter Beweis gestellt – und im Vergleich zum Vorjahr weist die kommende Sommersaison 2023 kumuliert ein Umsatzplus von 27 Prozent auf.

Rund zwei Drittel der Teilnehmer an einer aktuellen Reise-vor9-Umfrage blicken übrigens sehr optimistisch oder überwiegend optimistisch auf das kommende Jahr. Unter den Mitarbeitern von Reiseveranstaltern ist die Stimmung noch positiver als im Vertrieb.

Logiernächte aus Deutschland im Vergleich zu 2019:

Oktober: plus 8% ! Januar bis Oktober: minus 8.2% (zu 2021: plus 41%)

Wirtschaft

Die erwartete Winterrezession wird milder ausfallen als bislang erwartet. Das geht aus der neuen Prognose des ifo Instituts hervor. Demnach wird die Wirtschaftsleistung 2023 nur um 0,1 Prozent schrumpfen. Im Herbst erwarteten die Forscher noch minus 0,3 Prozent. Auch für das ablaufende Jahr 2022 hat das ifo Institut die Prognose zum Anstieg der Wirtschaftsleistung angehoben: auf plus 1,8 Prozent von zuvor plus 1,6 Prozent. Im Jahr 2024 wächst die Wirtschaft dann wieder mit 1,6 Prozent.

Auch die Stimmung in der deutschen Wirtschaft hat sich merklich aufgehellt. Der ifo Geschäftsklima-Index ist im Dezember auf 88,6 Punkte gestiegen, nach 86,4 Punkten (saisonbereinigt korrigiert) im November. Die Unternehmen bewerteten ihre aktuelle Lage wieder besser. Zuvor war der Lage-Indikator sechsmal in Folge gefallen. Auch die Erwartungen verbesserten sich merklich. Die deutsche Wirtschaft schöpft zum Weihnachtsfest Hoffnung.

Verbraucher

Die Deutschen bleiben auch im Jahr 2023 reisebegeistert, rechnen aber mit steigenden Kosten. Das zeigt eine aktuelle Umfrage des Hotelreueprogramms Wyndham Rewards. Während die Mehrheit (rund 61



Prozent) es nicht abwarten kann, wieder in den Urlaub zu fahren, rechnen rund 55 Prozent der Deutschen damit, 2023 aufgrund der Inflation und der gestiegenen Kosten mehr Geld fürs Reisen ausgeben zu müssen. Nur für rund 36 Prozent der Befragten sind höhere Kosten kein Grund, die Reisepläne zu ändern. Was die Art der Reisen angeht, so stehen laut der Umfrage für nächstes Jahr insbesondere Erholungsreisen von einer Woche oder länger (48 Prozent), sowie Städtereisen (31 Prozent) hoch im Kurs. Jeder Dritte zieht dabei neue Reiseziele in Erwägung und rund 15 Prozent überlegen, künftig statt mit dem Flugzeug, mit dem Auto oder Zug in den Urlaub zu fahren.

Zum Ende des Jahres 2022 hat sich die Verbraucherstimmung in Deutschland noch einmal verbessert. Sowohl die Konjunktur- und Einkommenserwartung wie auch die Anschaffungsneigung gewinnen hinzu. Damit setzt das Konsumklima seine vorsichtige Erholung fort. Moderatere Energiepreise als ursprünglich erwartet sowie die Entlastungspakete der Bundesregierung zur Dämpfung der Energiekosten sorgen für den steigenden Optimismus.

Campaigning & Activation

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 im Januar 2023.

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 und sowohl regional wie auch soziodemographisch an Schweiz-Zielgruppen ausgespielt.

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.

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.

GoldenPass Express x FOCUS.de: Zur Lancierung des GPX wurde auf FOCUS.de ein native Artikel geschaltet.

Deutsche Bahn Herbstkampagne vom 14.10. - 04.11.22: Integration in der digitalen DB Herbstkampagne „Sparpreis Europa“ mit Fokus Schweiz in den Quellmärkten NRW, BW, Hessen, München, Hamburg

KAM

SCIB - Sales Call „Genfersee“: Das Switzerland Convention & Incentive Bureau besuchte gemeinsam mit Montreux-Vevey Tourisme und Lausanne Tourisme 16 MICE Kunden in Frankfurt, Berlin sowie Hamburg

(22.11.-24.11.22), um über die Destinationen und die Schweiz als MICE-Land zu inspirieren.



SCIB - „IBTM World Barcelona“: An der diesjährigen Messe in Barcelona (29.11.-01.12.) nahm das Switzerland Convention & Incentive Bureau teil und hatte insgesamt 29 Termine à 20 Minuten.

SCIB - „MEET EUROPE SWITZERLAND“ Nach der erfolgreichen Austragung des 1. Meet Europe Events in Zürich in 2021, wurde dieses Format 2022 in der Stadt St. Gallen 05.-07.12.22 durchgeführt. Nach zwei Tagen in St. Gallen ging es für die Eventplanenden in die Berge. Als Post-Tour wurde Engelberg und Engadin angeboten.

DER Tour Campus: Am 15.11.22 war das Team ST STR mit einem Stand sowie rund 20' Bühnenpräsenz vertreten. Vor Ort waren 35 DER Tour Expedient*innen.

Meet&Greet Süd/Mitte – Graubünden: Zusammen mit Arosa Lenzerheide, Engadin St. Moritz sowie Davos Klosters und STC hat das KAM Team am 29.11. in Frankfurt (16 Expedient*innen) sowie am 30.11. in Stuttgart (25 Expedient*innen) Veranstaltungen organisiert. Des Weiteren wurden die Veranstalter E&P Reisen sowie TravelTrex in Köln und Cruise & Ride in Stuttgart besucht und auf den neusten Stand gebracht.

KMM

Swiss Cities Event in Berlin: Durchführung des Swiss Cities Mediendinner in Berlin mit 32 teilnehmenden Journalisten und 6 Städtepartnern. Sehr erfolgreiches Event, durchgeführt auf einem Solarschiff mit einer 2-stündigen Schifffahrt auf der Spree. Die Städtethemen wurden im Rahmen einer eigens erfundenen und illustrierten Sagengeschichte über den Schweizer Wassergeist präsentiert. Das Event fand am 10. November statt.

Future Activities

Top Spot Award of Switzerland - Winter Edition: Fortsetzung der Digitalkampagne mit dem neu generierten Winter Video-Content im Januar 2023.



1. Priority Markets

GREATER CHINA

Market Situation

November and December were eventful months in the Greater China Market. Harsh lockdowns were followed by an unprecedented sudden opening that resulted in a huge wave of Covid infections within two weeks.

Mainland China has announced the official border opening as per 8th of January 2023.

This has significantly altered the mood among the industry and the population.

Due to remaining structural impediments (flight capacity, visa procession etc.) we believe that we will only see a significant return of Chinese travelers in late Summer, early Autumn.

Best practice competitors

very few activities by competitors during this period - similar to us.

Campaigning & Activation

Most activities had to be postponed to the new year due to the ongoing pandemic situation in China in November and December.

KAM

KAM is slowly starting up their business again and events are coming back. While the mood is lifted, there's also remaining uncertainty and a lack of staff. It will certainly take some time until the industry is up and running again.

The MICE industry shows positive attitude towards the marketing reopening in the second half year of 2023 in Mainland China.

Agents in Taiwan and Hong Kong were very busy with the opening and business is resuming.

Luck Culture managed to visit Swiss Cities throughout December

KMM

We managed to send a KOL for the larger part of December to Switzerland.

Most other activities had to be postponed to January due to the lockdowns in November and the subsequent wave of Covid infections in December.



We had the Winter Media Kick-Off in Shanghai during the So-Swiss week organised by the Consulate General.

In Hong Kong and Taiwan we held our media kick-offs for the winter season with 30+ media and KOLs.

Future Activities

- winter roadshow events: club community events in Beijing, shanghai Guangzhou with Huaxue Zoo
- winter media conference in Beijing on 4th Jan
- STE vip dinner event on 3rd Jan.
- SCIB individual sales calls in east China in Jan.
- SCIB sales call with partners to Guangzhou in Feb.



1. Priority Markets

ITALY

Market Situation

Italian GDP is expected to increase in 2022 (+3.9%) and then slowdown in 2023 (+0.4%).

Employment, measured in terms of FTE, will record a higher growth respect to GDP with a more pronounced increase in 2022 (+4.3%) compared to 2023 (+0.5%). The improvement in employment will be accompanied by unemployment rate which will decrease significantly this year (8.1%) and rise moderately in the following year (8.2%).

Forecast scenario is characterized by downside risks associated with further price increases, a deceleration in international trade and the persistence of a restrictive monetary policy.

Italy is looking forward to a 2022-23 Christmas and New Year period with very few Covid rules in place after celebrations were limited in the past two years.

As well as family gatherings and events, this means the return of restriction-free holiday travel, and Italian residents as well as international visitors are planning to return back to the tourist hotspots for a break over the festive days. Italians are Christmas markets lovers and a big increase of visiting again the markets in big crowds (Italy, but also CH) is expected on the weekends.

Campaigning & Activation

Matching Day Modena Skipass Fair.

Date: 31.10.2022

What: Matching Day c/o Modena Fiera during Skipass Modena

Focus: Winter offer

Partners involved: Corvatsch, Diavolezza, Labalb

eNL II Cioccolatoino.

Date: 9.11.2022

What: eNL II Cioccolatoino sent to DB Trade

Focus: PromoSvizzera, Swiss Cities, Swiss Winter Village, TOD Roadshow, bern news openings, Christmas Pass Bern

Opened: 18.48%

Clicked: 2,36%

Distribution "Svizzera 06" magazine with DONNA MODERNA.

Date: 10.11.2022

What: Distribution of Svizzera 06 brochure about winter with women magazine DONNA MODERNA



Circulation: 40'000 copies

Area: Lombardia

Area Radio Spots.

Period: 21-25.11.2022

What: 25 spots 30" (5 x day) on 6 radios in Tuscany and Emilia

Subject: PromoSvizzera and Christmas Markets

Contacts: 1'170'000

Influencer trip with Ambassador Filippo & Filippo.

Period: 24-25.11.2022

What: Trip to Basel with Filippo & Filippo to promote Basel, with focus on Architecture, Museums and Christmas Markets

Creation of a youtube video and an itinerary-dedicated landingpage on MyS

Partner involved: Basel Tourism

Swiss Winter Village in Milan November 7 – 27

Winter launch & promotion with a synthetic ski slope for beginners, kids, young generation to push passion for winter sport and winter village with igloos and chalets for mountain destinations

65 media articles (print, online, TV)

10 Mio. Social Media impressions.

10'000 visitors in the winter village

7 events in the SWV:

Opening event with testimonials Michelle H., Giorgio R., Bernhard R.: 180 guests (VIPs, media & partners)

Trade workshop

Media partner (DV) event in collaboration with Ricola (casting with 200 women)

Après ski events in collaboration with Business Hub, Swiss chamber and Consulate General of Switzerland in Milan

ST E-Newsletter Stand Alone.

Date: 8.11.2022

What: Stand Alone Newsletter to promote Christmas Promo, Swiss Winter Willage, Winter offer and ride&slide

Open Rate: 33,36%

Delivery rate: 42'133



Rethinking “Sustainable tourism” in the 21st Century.

Date: 11.11.2022

What: Event in cooperation with the Istituto Svizzera di Cultura in Rome

Focus: Tourism and sustainable

Swiss Evening in Florence.

Date: 25.11.2022

What: Typical swiss dinner with raclette and fondue, organized in coop with the swiss consul in Florence

Partners involved: Mammut, RhB

Serata Gist in Rome.

Date: 1.12.2022

What: Christmas evening organized by Gist (Giornalisti Italiani Stampa Turistica)

Partner involved: Hotel Cooperation

Christmas party at the Embassy.

Date: 21.12.2022

What: Christmas dinner with italian and swiss journalists

Influencer Trip @imurr “Christmas in Geneve”.

Period: 11-14.12.2022

What: Travel trip in Geneve by Influencer duo I Murr

Content: Live posting on IG during trip in Geneve about Christmas markets, food, museums and hotels

Prize competition launched on their IG account to win, overnight at Hotel Bristol

Partners involved: Hotel Cooperation, Geneve Tourism

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

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Workshop Winter c/o Swiss Winter Village.



Date: 9.11.2022

What: Workshop for Travel Agents, t.o.'s, ski clubs, association and CRAL in Swiss Winter Village in Piazza Gae Aulenti in Milano

Organized in coop with Travel Quotidiano

Contacts: 70

Partners involed: Adrastea Viaggi, Andermatt, Corvatsch Diavolezza Lagalb, Crans Montana, Hotel Cooperation, Interlaken, Jungfrau, RhB, Radisson Blu, STS, The Chedi

Fam Trip Ticino.

Dates: 25-27.10.2022

What: Fam trip in Bellinzona, Locarno and Isole di Brissago

Participants: 5 travel agents of Assoviaggi

Partners involved: Ticino Turismo

Sales Calls Padova.

Dates: 15.11.2022

What: Travel Open Day in Padova

Participans: 30

Partners involved: Bern, BLS

Sales Calls Brescia.

Dates: 16.11.2022

What: Travel Open Day in Brescia

Participants: 30

Partners involved: Bern, BLS

Webinar Wallis.

Date: 24.11.2022

What: Webinar Wallis held by Travel Quotidiano

Partners involved: Aletsch Arena, Leukerbad, Regione di Martigny

Christmas party in Rome.

Date: 12.12.2022

What: Party for Christmas focused on travel agents in Rome c/o Ellington Club



Distribution brochures Winter, Cities, STS Map, gadgets from Ricola & Rausch

Prize: Mammut

Partner involved: RhB

KMM

Media winter event in Rome.

Date: 8.11.2022

What: Media event at SAID

Participants 25 journalists

Partners involved: Interlaken, STS

Media Meeting Zurich in Bologna.

Date: 9.11.2022

What: Exclusive Media Meeting in Bologna at Casa Borgonuovo

Participants: 10 journalists & 6 agencies

Partner involved: Zurich Tourism

Radio and TV interviews in Florence.

Date: 22.11.2022

What: TV Interview on Reteitalia 7Goig and Radio Interview on Radio Toscana

Focus: Winter and Promosvizzera

Partners involved: BLS, RhB, STS

Media lunch in Florence.

Date: 22.11.2022

What: Informal lunch with top media of Florence

Partners involved: RhB

Media and Trade Event Bari.

Date: 29.11.2022

What: Media event circolo della Vela di Bari

Participants: 42 journalists

Partners involved: RhB, STS

Group media trip Geneve.



Dates: 14-16.12.2022

What: group media trip in Geneva

Focus: culture and Christmas markets

Participants: 6 journalists

Organized by Geneve Tourism



1. Priority Markets

NORTH AMERICA

Campaigning & Activation

Campaigning & Activation

- GoPro Creator Summit post-campaign, Nov/Dec
- Art & Culture Cities Campaign, additional advertorials and paid native, Dec
- AFAR Winter campaign, Nov/Dec
- Swisstainable Push, until the end of Nov
- Social Media: Pushed End of Year Countdown, Dec

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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
- Sales Calls Arizona, November 15 - 18
- USTOA Annual Conference & Marketplace 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



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, Geneva and le Diablerets, December 1-5
- Extravaganza Media Event, Grand Train Tour of Switzerland, with STS CEO Marius Lauber, December 12
- Bay Area Travel Writers Associations Christmas dinner at Switzerland General Consul residence in San Francisco, December, 12

Future Activities

KAM

- STMS Zermatt 2023, January 15 - 19

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- Meet the press with Valais Matterhorn Region, Ticino, STS and Lucerne in Denver, Austin, New York, January 23-26
- IMM 2023 Media connect January 26
- Media Trip learn to ski
- Media Trip LGBTQ outlets



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 ten 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

November:



Swiss Deluxe Hotel Activity with 5x partners and Jan E. Brucker (Hotel Quellenhof, Four Season Geneve, Lausanne Palace, Le Crans & Carlton St Moritz)

About the activity:

- Sponsorship of a high-end B2C dinner with Forum
- Forum: Forum is a global network, started in London in 2010. All members are personally invited to join by the club's Advisory Board. This High-Net-Worth community is made up of over 300 business leaders, located across 30 cities worldwide
- 6x SDH hotels have signed up

Deliverables:

- Sponsorship – Awareness with Logo presence
- Forum guests will be introduced personally to each of the hotel representatives during lunch
- Competition to win different trips to Switzerland
- SDH speech & Swiss Red Wine, plus luxury give-away

December:

Health Tourism Promotion 2022:

- Objective: Create awareness about 'why Switzerland should be on your list for your next medical health treatment'

Media Platform Tatler:

- Tatler has the biggest spending audience at Conde Nast. The audience is looking for the very best, most luxurious destinations to travel, but also inspiration on where to live, second homes and where to get the best health treatments.
- Proof of this is the Tatler Cosmetic Surgery Guide, which is one of the biggest of its type (a 110 page print supplement) in the UK and shows how fixated our audience is on high-end health care

Deliverables:

- 1x online native article (interactive) with the call to action to the main health tourism page
- Traffic drivers to reach the right audience
- SoMe amplification

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-2. November 2022 Meet the Swiss Workshop in Marlow with 31 Swiss Partners and 31 Participants for one-to-one meetings and side programme with panel discussions with Simon Calder from The Independent and team building activities

-3 November ETOA Special Swiss VIP dinner for 15 Tour Operators and the Board of the ETOA

-4 November ETOA GEM Workshop day in London with 20 one-to-one meetings



- 7-9 November 2022 World Travel Market in London with 20 Swiss Partner and meetings with buyers
- 14-17 November 2022 Aspire Luxury Event in Basel, Luzern followed by a River Cruise for 30 one-to-one meetings with 30 agents
- 23 November 2022 Country Retreat in Ascot for 24 hours with 20 luxury agents for one-to-one meetings and team building
- 30 November 2022 Luzern Trade dinner for 15 guests at Somerset House in London at Chalet Suisse
- 6 December 2022 Bern Trade dinner for 17 guests at Somerset House London at Chalet Suisse
- 13 December Aspire Travel Awards for 150 guests with Switzerland presenting the Sustainable Award showing also a 60 second movie on Sustainable
- Special Edition of the Scenic Rail Brochure with focus on Swiss Travel System direct mail distribution

KMM

- 1 Nov: AITO meets the media
- 7 Nov: WTM media Monday with several media interactions/pitches
- 8 Nov: Media breakfast the Green Traveller
- 21 Nov: Media Dinner Dublin with 17 media representatives
- 14 Nov: regular exchange with PR agencies representatives
- 28 Nov: regular exchange with fellow (competitor) NTO's
- 1 Dec: Webinar for Swiss partners (approx 40 participants)
- 7 Dec: Lunch at SKATE with regions Gstaad and Interlaken
- 14 Dec: Exchange with SRF UK correspondent
- 15 Dec: Exchange with The Telegraph, upcoming winter topics during thier year end event
- 19 Dec: Media Newsletter with topics such as 125 years Gornergrat railway/first bob sleigh run St Moritz, new Hotel Fiescherblick, Revival Record Festival Crans-Montana,



2. Active Markets

AUSTRALIA

Market Situation

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

Overseas departures and arrivals in both Australia and New Zealand have reached nearly 50% of what they were pre pandemic as of end of August 2022. This corresponds with ST Australia's estimation that 60% or more of the 2019 overnights will be reached by the end of 2022.

Campaigning & Activation

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

18-19 November: Switzerland present with a stand at the 2022 Wellington Lantern Festival (represented by Embassy of Switzerland in Wellington). Various activations such as a Switzerland photo booth.

Nov/Dec: International Traveller Magazine: Winter campaign native advertising with RF banner campaign

Dec: Great Walks Magazine: 4 page print editorial and digital campaign. Focus on Long distance hiking.

Nov: International Traveller Magazine: Digital Feature, focusing on Winter Ski Safari (St. Moritz – Andermatt – Zermatt).

November: Get Lost e-Magazine: Switzerland Grand Tour feature, Greening out with Sean Scott (Influencer who visited Switzerland earlier in the year).

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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: Switzerland presentation at "Tourism Summit Aotearoa", New Zealand's main tourism event in the year. Prestigious format and attendance of Prime Minister Jacinda Ardern.

13-19 December: Winners trip STE. All winners from STE Roadshow were invited to an exclusive family to Switzerland. Visiting all market key regions. Focus on panoramic trains and Christmas markets.



KMM

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

Nov: Media Press release. Main topic: RhB world record

Nov: Media News release. Main topic: Winter News including Winter booklet



2. Active Markets

AUSTRIA/HUNGARY

Market Situation

Hohes Wirtschaftswachstum (4,5%), tiefste Arbeitslosigkeit seit 2008 - dennoch sehr vorsichtiges Konsumverhalten: Ende Januar kommen die neuen Gasrechnungen zu den Haushalten - und hier wird ein enormer Anstieg erwartet. Potentielle Gäste sind daher aktuell sehr zurückhaltend mit „teureren“ Entscheidungen.

Positiv ist die (noch schlechtere) Schneesituation in Oesterreich: unserer Zielgruppe ist bekannt, dass die Skigebiete in CH ungleich höher und damit schneesicherer sind.

Campaigning & Activation

- 01. November 2022: 1/2 Seite im Reisetipps zum Thema Winter Magic Tours (Auflage 55'000 Exemplare);
- 02. November 2022: Online-Advertorial des Excellence Programms von STS in österreichischem Reisemedium TIP (6'353 Unique Visitors pro Woche)
- 08. November 2022: Doppelseitiges Print-Advertorial zum Bernina Express im Reiselust Premium Magazin (Auflage 80'000 Stück)
- November 2022: Doppelseite in Print-Reisemagazin des KAM Reisethek zu Laax und Swisstainable (Auflage 95'000 Stück)
- November-Dezember 2022: NL-Abonnenten Leadkampagne
- 23.-31. Dezember 2022: Rhätische Bahn Digitalkampagne in Kooperation mit KAM ÖBB Rail Tours (ca. 9 Mio AIs)
- 31. Dezember 2022: 1/2 Seite Inserat mit buchbarem Angebot des KAM ÖBB Rail Tours in Ergänzung zu einem mehrseitigen, redaktionellen Bericht zu den Schweizer Bergbahnen (Auflage 93'358 Stück)

KAM

- 14. November 2022: Cheese Mailing - Nachbearbeitung vom ÖRV-Kongress an 40 Kontakte versendet
- 09. November 2022: BTB Messe Besuch der CH Partner, ca. 1000 Kontakte
- 21. November 2022: Corps Touristique Galaabend mit ca. 220 AT-Travelagents und Reisejournalisten
- 29. November 2022: B2B Newsletter an 161 AT Reiseveranstalter gesendet



KMM

Presse e-Newsletter:

Im November und Dezember 2022 wurden 2 Presse eNewsletters an je 200 österr. JournalistInnen versendet.

Tourismuspresse.at-Aussendungen:

Im November und Dezember 2022 wurden 2 Tourismuspresse.at-Aussendungen zu an je ca. 33'500 Kontakte versendet.

Future Activities

- ÖBB Railtours Traumzüge Katalog Rückseite via STS
- Europe Culinaire Abendveranstaltung in Wien mit Schweiz Schwerpunkt
- Eurofun Gästezeitschrift
- KAM Kooperation gemeinsam mit STS und STC: Reisethek, Raiffeisen Reisen, Retter Reisen



2. Active Markets

BRAZIL

Market Situation

The ghost of inflation still haunts the great economies in the world. In Germany, prices rise, on average 10%, the highest threshold in 70 years. In the United States, the inflation accumulates an increase of 7.7%, slightly below the accrued for the last months, which reached 9.1% in June. In South America, the picture is also preoccupying, with inflation gaining force in Colombia and exceeding 80% in Argentina.

In Brazil, the curve is slowing down. Currently, the IPCA, the official index in the country, is 6.4% for the 12 months up to October, way below April's peak of 12.13%. In October, specifically, there was an increase of 0.59%, putting an end to the 3-month cycle of deflation. Although nearly all the groups have registered a raise, pressures have been more punctual, and not so persistent in comparison to what was seen throughout the first semester.

With inflation cooling down, the Brazilian Central Bank has stagnated the basic interest rate at 13.75% a year. Thus, this creates space to think about a reduction cycle of SELIC in 2023. The market forecasts this movement around the middle of the year.

Global uncertainties, mainly regarding the Chinese economic activity and what threshold the American interests will reach, keep the exchange rate under pressure, which recently, has fluctuated between 5 and 5.40 BRL per dollar. Evidently, there is another event involved that causes noise and instability, the Brazilian presidential elections. Questions hover on the fiscal issues in the country, and how they will be handled by the economy staff of the new elected government.

The scenario of a high-cost dollar hampers the reduction in inflation's pace in a more intense way in the country. Another factor that has caused apprehension is the price of the oil in the international market, which continues to be above 90 dollars per barrel. Fuels like gas and diesel oil, which had strong reductions in a row since July, were back with prices' increase in October, and the tendency is for small new readjustments over the following months.

Regardless, with inflation's average gradually giving in, what brings relief to the wallets of consumers, who can once again gently achieve a greater buying power. At the same time, the job market is still heated, with the country having created beyond 2 million formal job positions throughout this year. These two variables, income, and jobs are essential to stimulate commerce sales. Such that in September, for instance, there was a 1% rise in the comparison with the same period last year. In consumption's basic sector, the supermarkets, sales have increased 3.8%.

However, the sectors that are more susceptible to credit, like the furniture and household appliances, construction materials and vehicles, faced more difficulties moving forward with the high-interest scenario. Within the month, these were the negative highlights, with -5.9%, -7.9%, and -1.9%, respectively.

In the service sector, the growth pace keeps going strong. In September, there was an increase in activities of 9.7%. The Highlights are those sectors that provide services for families, like hotels, restaurants, etc., which pointed out an annual increase of 17.8%. Information technology services also contributed to the general positive performance, with variation of 20%.

Tourism, specifically, profited R\$ 18 billion in September, an increase of 29.2% in the annual comparison, and it was the best result for the month since 2014, according to a survey by FecomercioSP. All the sectors have grown in relation to 2021. Nevertheless, the highlights were the groups of air transportation (63.1%), and accommodation and food (29.2%).



The segment goes through a positive phase of heated demand. However, part of the companies' profit is related to the inflation of tourism services. For example, flight tickets prices rose, on average, 40% in one year. It will be a massive challenge, managing to keep the attractiveness by the consumers for a longer period.

In general, Brazilian economic indicators show that the worst phase regarding the pandemic's consequences and the war in Ukraine has passed. Nevertheless, in order to have a significant improvement, consumers will need patience because it will be a long process ahead, full of internal and external challenges.

In the national picture, challenges go through high interests and high exchange rate, as well as the lack of clarity about how the matter with public expenses and the expenditure ceiling will be solved. In the external scenario, the slow pace of China's growth and the issue with the American interest level keep the governors under alert.

Anyhow, Brazil is in a relatively more favorable global position regarding inflation. High prices generate the greatest social damages, a reduction in the consumption quality. Inasmuch as it's possible to find food with gradually more modest prices, there is an encouragement, on which consumers can hope for better days for their family's consumption.

CONFIDENCE INDEXES:

The Consumer Confidence Index (ICC) increased 2.4% in October and reached the highest threshold since January of last year, of 114.2 points. In the annual counterbalance, there was a 3.4% growth. Consumers are more confident due to inflation's cooling down, above all in the food group, which weighs more in their budgets. At the same time, a more heated job market brings better opportunities to the families in the capital of São Paulo.

The Trade Entrepreneur Confidence Index (ICEC) pointed out a monthly increase of 3.4% and reached 122.4 points in October, the highest level since the beginning of the pandemic, in March 2020. In the comparison with October 2020, there's 7.5% increment. Better consumption conditions of families are allowing a better performance in the commerce sales, and consequently, increasing business owners' optimism.

Campaigning & Activation

- **Dedicated Newsletter: Highlight:** Health Tourism dedicated newsletter. **02 mailings:** Nov 17th and 30th. **Mailing:** 26.500 mails for travel agents; 160 mails for corporate travel managers; 1.800 WhatsApp messages to TAs **Opening rate:** 27,16%

- **EVENT "GENTLEMAN'S CLUB": November, 10th.** Event at Consul Residence in São Paulo to launch an exclusive travel package to entrepreneurs. The trip will take place in April, 2023 to Zurich and Geneva including special visits to Swiss companies. Event to 30 guests. ST Presence: Fabien Clerc and Natália Leal.

- **B2B EVENT WORLD CUP'S BRAZIL & SWITZERLAND GAME: November 28th.** Switzerland Tourism sponsored Belmond's trade event to watch the World Cup's Brazil & Switzerland game; Meet around 230 trade contacts; Distribution of customized Lindt's gift; Message of Brazil & Switzerland as the perfect match; ST also hand delivered customized gift boxes for VIP clients to watch the game from their home; ST Presence: Mara Pessoa.

- **B2C EVENT WORLD CUP'S BRAZIL & SWITZERLAND GAME: November, 28th.** Event at Bondinho – Morro da Urca, Rio de Janeiro to watch the World Cup's Brazil & Switzerland game; VIP área to Switzerland Tourism for 100 guests. Mailing: Digital influencers from Rio de Janeiro and special partners. Included in the event: DJ, special Swiss catering, Swiss wine and Lindt chocolate.



Switzerland Tourism Brazil got a special approval to use “We need Brazil and Switzerland”. ST Presence: Fabien Clerc and Natália Leal.

- **32nd EUROPE COMMUNICATION AWARD: November, 29th**. European Travel Commission Event: 32nd Europe Communication Award event at France Consulate. Event to 80 guests: media and travel agencies. ST support: gift bag and Swiss wine. ST Presence: Natália Leal.

- **PRIMETOURL – HEALTH MAGAZINE DISTRIBUTION: December, 2022**. 200 Health Magazine distribution in partnership with Primetour through Mercedes-Benz mailing to potential luxury cliente; 50 Health Magazine distribution to Primetour IC’s selected client; Customized message and insert into brand new Primetour’s luxury Magazine.

- **TERESA PEREZ TOURS - HEALTH MAGAZINE DISTRIBUTION: December 2022 – January 2023**. 09 Health Magazine distribution in partnership with Teresa Perez Tours to selected list of potential luxury cliente. Customized message and insert into the December edition of The Traveller Magazine – dedicated article of Health & Wellness Tourism in Switzerland as result of the October Media trip. Sent to client’s home address through the months of December and January.

- **Dedicated newsletter: Highlight:** Zurich Tourism dedicated newsletter; **02 mailings:** Dec 14th and 20th **Mailing:** 26.500 mails for travel agents; 160 mails for corporate travel managers; 1.800 WhatsApp messages to TAs; **Opening rate: 26.01%**. Key partners highlighted in the content: Zurich Tourism; Lindt Home of Chocolate; STS & MOB;

- **FVO & ST Calendar 2023:** Switzerland Tourism Brazil sponsored FVO’s annual calendar as part of a joint annual business plan. 500 print to be sent to 130 luxury travel agencies from across Brazil. Customized new year’s message and I Need Switzerland campaign message. Monthly highlight promotion of Swiss partners: St Moritz, Verbier, Crans Montana, Zermatt, Zurich, Geneva, Lucern, Lausanne, Swiss Travel System, gastronomy, etc.

- **Xmas Giveaways:** Switzerland Tourism Brazil delivered Xmas Giveaways including panetones from Lindt and customized festive season message to 60 main trade contacts and partners from the luxury market of São Paulo. Swiss partners: Lindt Brazil;

- **Seeding activity:** Switzerland Tourism Brazil has sent to 100 digital influencers an “Advent Calendar”. **The advent calendar contain:** 24 tips about tourism in Switzerland. Every tip has a QR Code to get more information online. All of tips is reproduced on Instagram @MySwitzerlandBR. 24 Lindt Ball. On December, 25th the gift is a small cow. The calendar is also an invitation to the event on December, 07th.

- Winter Launch Event: **December, 7th**. Event at ROI Restaurant at CJ Shops (JHSF Group). The event launched the winter season to a very potential final costumers and digital influencers – total of 51 guests. A lucky draw was done during the event. Lucky draw’s partners: SWISS: 2 business flights; The Dolder Grand Hotel: 2 overnights in a double room; Badrutt’s Palace Hotel: 2 overnights in a double room; Natália Leal done a quick introduction about the winter season in Switzerland. Gift bags containing: a bottle of a Swiss wine, St. Moritz Magazine and an ON bonnet.

- Partnership at Cidade Jardim Shopping Mall: **Between December, 1st and January 2nd**. In partnership with Cidade Jardim shopping mal – Switzerland Tourism organized a “buy and win” promoting a prize: a Trip to Switzerland. The promotion will be during the month of December. The partners involved have agreed strategic communication points: Backdrop or elevator door to each partner. Advertisment in the Cidade Jardim Magazine. Logo’s around the shoopping mall about the x-mas promotion “buy and win”. SWISS; La R serve Hotel; Geneva; Guarda Golf Hotel & Residence; Perfect Trip (travel agency in the mall) will offer the meals to the winner;

- **Launch Event winter campaing at Perfect Trip: December 14, 2022**. Xmas Consumer Campaign in partnership with Prefect Trip running from Dec 01 – 31, 2022 at Cidade Jardim Shopping Mall; Campaign prize: Business class tickets with Swiss + 2 nights Guarda Golf Crans Montana + 2 nights La Reserve Geneva + Meals (lunch and dinner) offerd by Perfect Trip. Launch event on Dec 14



organized by Perfect Trip. ST support with 20 bottles of wine. ST Presence: Fabien Clerc, Mara Pessoa, Natalia Leal.

- **GRU Airport: Between December, 9th and 30th from 2 pm to 8 pm**, Switzerland tourism was present in the VIP Safra lounge (business and first class) at Guarulhos Airport. 1 hostess handing "health magazine" and lindt chocolates for those who are interested. Audience: AAA, A – 500 people per day at the lounge. Coverage: Health tourism.

- **GRU Airport: Between December, 16th and 30th** the health movie was showcased in the big screen at Guarulhos airport in front of the VIP Safra lounge (business and first class). The screen reached people from the entire international área. Coverage: Health tourism.

KAM

- **TTW GROUP: November 01st**. Dedicated Gstaad winter training presentation. 28 travel agents from TTWLab + TTW Group operations team attended. Dedicated Q&A session with agentes. Breakfast sponsored by Switzerland Tourism.

- **FESTURIS: November 03 – 06**. Switzerland Tourism had the opportunity to showcase the latest news about Swiss tourism with the 12'000 participants, with focus on the luxury segment including STS. 42 pre-scheduled meetings with highly interested agencies and operators. Joint-event with ETC Brazil Chapter. Partners who also attended: Vanda Catão, **Lucerne & Mt. Titlis** Fernando Aquino, **Jungfrau Railway**.

- **PRIMETOUR'S ANNUAL CONFERENCE: November 19th**. Switzerland Tourism was one of the supplier sponsors for Primetour's annual conference at Palacio Tangará. Opportunity to talk to 160 employees (Primetour's management, operations, sales team + Primetour's ICs from across the country); Destination video; Logo in the event communication;

- **TTW LAB TRAVEL TALKS: November 25th**. TTWLab agencies exchanged trends that guide luxury tourism in Brazil and had important insights to further strengthen the relationship between the Brazilian market and Switzerland Claudio Zemp, Director in the Americas; Fabien Clerc, Market Director Brazil Mara Pessoa, Trade Manager Brazil.

- **STS Excellence Brazil Famtrip: December 01st – 07th, 2022**. Famtrip in partnership with Swiss Travel System; Nine travel professionals from Brazil were invited to experience the new Goldenpass Express and highlights of Switzerland including: Montreux, Vevey, Jungfrau region, Engelberg-Mt Titlis, Lucern, and Zurich. Program support: Montreux-Vevey Tourisme & Convention Bureau, Hôtel des Trois Couronnes Vevey, Jungfrau Region Tourism, Interlaken Tourism, Victoria-Jungfrau Grand Hotel & Spa, Luzern Tourismus, Engelberg-Titlis Tourismus AG, Kempinski Palace Engelberg, Zürich Tourism and many more local partners involved. ST Presence: Mara Pessoa.

- **TTW GROUP POST-ILTM FAMTRIP: December 09th – 15th, 2022**. Exclusive Winter Famtrip organized by ST Brazil in partnership with TTW Group; TTW Group's product director + six travel agents members of TTW Lab experienced a customized ski program including: St Moritz, Zermatt, and Zurich. Program support: Engadin St Moritz Tourismus AG, Kulm Hotel St. Moritz, Zermatt Tourismus, Mont Cervin Palace, Air Zermatt, Zermatters, Swiss Travel System, Glacier Express, La Réserve Eden au Lac Zurich and many more local partners involved. Great Social Media results and engagement;

- **Primetour training- Health Tourism: December 13, 2022**. Dedicated Health Tourism training presentation; 40 travel professional from Primetour B2B and B2C teams attended (25 online + 15 face to face); Dedicated Q&A session; Afternoon tea sponsored by Switzerland Tourism; ST Presence: Mara Pessoa.

- **Blue Papaya Winter Sales Incentive Campaign - November 2022 – January 2023**. Dedicated



Webinar held 28 & 29 of November 2022 (30 attendees). Swiss-inspired prize for participants of the 2-days webinar. Sales incentive campaign period: Nov 28, 2022 – Jan 31, 2023. Partners involved/promoted: Crans Montana Tourism; Guarda Golf; St Moritz Tourism; Kulm Hotel St Moritz; Grand Hotel Kronenhof Pontresina; Badrutt's Palace Zermatt Tourism; Mont Cervin Palace, Monte Rosa & Schweizerhof; Swiss, Swiss Travel System;

- **Health Magazine b2b2c distribution** in partnership with Teresa Perez Tours to selected list of potential luxury cliente. Customized message and insert into the December edition of The Traveller Magazine – dedicated article of Health & Wellness Tourism in Switzerland as result of the October Media trip. 309 Magazines sent to client's home address through the months of December and January.

KMM

- **SEEDING ACTIVITY WORLD CUP'S BRAZIL & SWITZERLAND GAME: November, 28th**. Seeding activity to 50 journalists and digital influencers from São Paulo. ST Brazil prepared a special box including Brazilian products: castanha do Pará, doce de leite, brazilian beer and Swiss products: cheese and chocolates to promote the message "we are the perfect match".

- **Media Trip return November article at Exame magazine.** 77k copies, Audience: AAA, A . Coverage: Health tourism.

- **Media Trip return November article at Forbes.** Zurich and St. Moritz; 30k copies; Audience: AAA; Coverage: Luxury.

- **Metaverso:** Switzerland Tourism Brazil promote the destination in the metaverso in partnership with a celebrity; Page Views: 20K; Instagram: @lamgalis.

- **International Media Trip: Between December, 1st and 4th.** Trip to promote the new Golden Pass Panoramic Express. Fabiane Gama - @loucos por viagem – 578K followers;

- **Media result December: Hub Elite Magazine – cover & article.** Printed and digital magazine; Magazine Cover (Zurich) + 2 pages article; Copies 2'600; Audience: Luxury clientes (database of eleven travel agencies from Rogeria Pinheiro's mentorship program); Coverage: Zurich, Lindt Home of Chocolate, Lake Geneva, Montreux& Montreux Jazz Festival, Lavaux, Swiss Travel System/MOB, St. Moritz, Zermatt, Lucern, Engelberg-Titlis, Art Basel.

- **Media result December: Forbes Magazine - article.** Printed and digital magazine; 22'000 copies; 78'300 digital users (APP); Audience: AAA, A; Coverage: Health tourism.

- **Media result December: The Traveler - 7 pages article.** Printed and digital magazine. 15'000 copies; Audience: AAA,A; Coverage: Health & Wellness tourism.

Future Activities

- KAM: Blue Papaya WINTER Sales Incentive Campaign;
- KAM/KMM: Site Inspection BRASKICUP: January 09-13, 2023. St Moritz Tourism.
- KAM: Verbier Winter Famtrip: January 11-13, 2023. 3 Brazilian Tour Operators.
- KAM: Pontresina & St Moritz Winter Famtrip: January 11-13, 2023. 3 Brazilian Tour Operators.
- KAM: STMS Zermatt - January 13-19, 2023. 6 Brazilian buyers.
- KAM: Teresa Perez Winter Famtour - January 16-23, 2023.



2. Active Markets

CZECH REPUBLIC

Market Situation

After gradual recovery from the Covid-19 is the market currently successfully facing challenges in form of increasing prices of the energy and one of the highest year-to-year inflation rate in EU caused by Russian aggression and war in Ukraine. Czech government provided max. capping of electricity for next year (ca 200,- CHF / 1 MWh) and the increase of the electricity prices for household is less than formerly expected and the gas reserves is full of it 98% capacity for Winter 2022/2023. Due the pandemic Czech household savings were slowly accumulated and now allow the Czechs to travel without major restrictions. Political situation is stable on long-term basis, and the Czech are expecting Presidential vote in January 2023.

Economics:

Economic situation of Czech market is restoring from the pandemic years with growing GDP with lower growing tendency in 3Q/2022 (+1,6% in 3Q/2022, +3,6% in 2Q/2022 and +4,9% in 1Q/2022). Inflation rate for 2023 is expected to be with moderate slow down but remain high (up to 20%). General unemployment rate is keeping stable around 2 – 3,5 % and the Czech workforce market is facing challenges to find suitable employees in service and industrial / construction sectors of the economy. Czech currency experienced long-term stability during recent years and faced increased volatility during Summer / Autumn 2022 (exchange rate between 24,70 up to 26,20 CZK per 1,- CHF). Now the exchange rate is again stable around level of 25,- CZK per 1,- CHF.

SOURCE: Czech Statistical Office (www.czso.cz), Czech National Bank (www.cnb.cz)

"Inflation rate may reach 20 % at the beginning of the new year. But we can expect inflation rate to fall substantially further." said Aleš Michl, Governor of the Czech National Bank.

The analysts also believe the decline in real wages, which is the main driver of the recession, will continue in year 2023 because it brings with it a decline in household consumption, which is dragging the economy down. "On the contrary, the economy is being held up by export production," said Jan Bureš, Chief economist at Patria Finance.

Travel Industry:

Despite of high year-to-year inflation rate, Czechs are travelling without any major restrictions, and they are already booking their summer holidays with TO's. Big Czech tour operators are now selling its Switzerland products and trips for 2023 with higher interest by Czechs – products for 2022 were completely sold out in most of Czech TO's and TA's during Summer 2022. TO's are now adding new Switzerland products for Winter 2022/2023 and for Summer 2023 as they have good outlook for upcoming touristic year.

There are currently 576 active tour operators with valid mandatory insurance against bankruptcy including 190 tour operators (decreased amount of TO's, increased amount of TO's with Switzerland products compared to 2021) and 67 travel agencies with Switzerland offer.

New direct night train connection (operated on daily base by Czech Railways) from Prague to Zurich (via Germany and Basel) will launch in December 2022 and extend current night train from Prague to Zurich (via Austria and Sargans).



Travel Behaviour:

Main segments for Czech tourists in Switzerland remain without any major changes – most important theme is active vacation with nature experiences (Nature Lover, Outdoor Enthusiast, Snow Sports Enthusiast) and Swiss panoramic trains and public transport system (Attraction Tourer). Segment Luxury Traveller recorded increased interest between Czech tour operators as more TO's focused only on exclusive and premium destinations were adding Switzerland to its offer during 2022.

Czech were always very much interested in holidays with own car transport – now they are looking more for touring possibilities in Switzerland (67,5% of Czech use private transport in Switzerland), especially in connection to the GToS and GTToS and Swisstainable experiences.

Supplementary accommodation (mostly apartments) is still one of the top accommodation type (72,5% of Czechs are looking for Supplementary type of accommodation) as it is offering possibility to extend stay in Switzerland with very favourable conditions.

Campaigning & Activation

- 1. 11. – Winter promotion in form of photo slides played in 16 TV screens in shopping center OC Flora in Prague focused on RhB, Engadin, Davos Klosters, Schilthorn, Aletsch Arena, Zermatt Bergbahnen, SGV, Pilatus, Rigi, JFB and Chur
- 3. 11. – Travel presentation focused on touristic, economical and culture from Liechtenstein presented by journalist Pavla Apostolaki in city library of Pardubice
- 5. 11. – 4/1 advertorial focused only on Schilthorn and its winter possibilities placed in most important winter magazine SNOW with promotion of James Bond Brunch, 007 burger, ski pass update for 2022/2023, Inferno Rennen, Schilthorn 20xx, snowfarming, hotel Blumental and Fondue & sledging package
- 12. 11. – ST stand with maps & brochure distribution (incl. Market Partners) and consultation possibilities at biggest outdoor travel festival in Czech Republic – Festival Obzory 2022. ST live presentation “TOP 10 hidden valley of Switzerland“ presented by Alena Koukalová on 12. 11. (95 participants). Partnership of Pilatus-Bahnen AG in the festival contest (prize for winner – 2 tickets to Pilatus).
- 14. 11. – Advertorial promoting winter possibilities of Engadin (ski- cross-country ski, snowshoe hiking, spa, Lucerne with Rigi and RhB Winter Bernina Panorama offer) placed at fitness and lifestyle website portal Kondice.cz
- 15. 11. – Networking dinner and wine tasting of Czech wines with Marting Nydegger organized for VIP trade and media representatives in the Czech market
- 15. 11. – Winter ski promotion focused only on Davos Klosters placed at top first place in e-newsletter of magazine Travel Fever (premium luxury travel magazine) sent out to its exclusive subscribers
- 17. 11. – 1/1 advertorial placed in lady fitness and sport magazine Kondice with promotion of Engadin (ski in Samnaun, Via Silenzia, Val Mustair, Bogn Engiadina), SGV with Rigi (ship trips on the Lake Lucerne with combination to the trip to Rigi and to Rigi Kaltbad spa), and RhB winter offer Bernina Panorama Winter
- 17. 11. – 1/1 AD of Winter GTToS placed in lady fitness and sport magazine Kondice
- 17. 11. – Winter edition of magazine Switzerland placed as a supplement of magazine SNOW (SNOW 141 time) distributed to magazine SNOW subscribers



- 18. 11. – Winter edition of magazine Switzerland placed as a supplement of magazine Premium Ski 11/2022 distributed to magazine Premium Ski subscribers
- 20. 11. – 4/1 advertorial focused on sustainable winter possibilities in Aletsch Arena placed in magazine SNOW
- 21. 11. – PR article placed at one of biggest and most known newspapers website - Denik.cz with promotion of TOP 10 winter experiences in Switzerland (Ski and SNB in Davos Klosters, cross-country ski in Engadin, snowshoes in Aletsch Arena, snow hiking in different regions, fondue in cogwheel train to Rigi, Bogn Engiadina Scuol, GTToS and RhB, Christmas markets in Montreux and Zurich, Fasnacht in Basel and Lucerne, Tschaggatta in Lotschental, gourmet trips with SGV)
- 21. 11. – Switzerland partnership of the celebrating evening for university students CZU (Czech University of Life Sciences) with promotion of Pilatus, Kambly, Schilthorn, Swiss chocolate, SGV, SWISS, Victorinox and Nestle
- 22. 11. – Live travel video broadcast via Zoom on ST Czech Facebook page (www.facebook.com/mojesvycarsko) focused only on touristic, economical and culture from Liechtenstein presented by journalist Pavla Apostolaki
- 26. 11. – Switzerland partnership with travel festival Kolem sveta (Around the world) in form of travel presentation focused on Liechtenstein, ST printed materials distribution and contest partnership with two tickets to Pilatus
- 29. 11. – Magazine SNOW exclusive newsletter promoting only Davos Klosters sent out it is mailing database with promotion of all DDK ski resorts, winter guest program, snowshoe hiking possibilities, skitouring, igloo experiences, and accommodation packages by Mountain Hotels Davos.
- 30. 11. – 6/1 advertorial with in form of trip report (PART 1) focused on promotion of hiking in connection with RhB and Engadin Scuol, Guarda, Morteratsch, BEX, Alp Gruem, Diavolezza, Val Poschiavo, and Berguen placed in premium travel magazine Travel Life
- December – Month promo poster campaign in Prague metro line C with focus on Swisstrainable and with Interhome contest
- December – Month promo of Swisstrainable winter holidays with focus on active ski holidays in Switzerland in form of digital slides on LED displays in main departure hall at Prague main train station
- 3. 12. – 1/4 AD promotion of Swisstrainable offers and possibilities of Switzerland to its guest placed in special travel edition of printed supplement Deník Extra presenting holiday destinations
- 8. 12. – 4/1 advertorial focused on sustainable winter possibilities of Lower and Upper Engadin placed in magazine SNOW
- 8. 12. – Month contest in magazine SNOW (1/1) and website snow.cz in form of contest form where people have to find out ski resort on the photos from ski region
- 8. 12. – ST Newsletter 12/2022 for December 2022 with promotion of: opening ski season (Davos Klosters, Samnaun, Zermatt, Schilthorn, Aletsch Arena); Bernina Panorama Winter; MOB GoldenPass Express; Switzerland Christmas gifts; contest in Prague metro with Interhome; ST Advent calendar; Christmas markets in Montreux; CD Ski in Davos Klosters; Winterlaken Card; Sledging at Pilatus; Pistenbully experience in Zermatt; fondue rides at Rigi; new STS map for free order; new winter edition of ST magazine Switzerland; TO CEDOK and TO Amitours ski and train trips to Switzerland; photo of the month from Laax
- 10. 12. – 1/1 Bernina Express AD in magazine Luxury Design and Developer
- 10. 12. – 6/1 advertorial presenting Switzerland gourmet possibilities combined with Summer and



Winter travel tips in special edition of lifestyle / social magazine EPOCHA

- 10. 12. – 4/1 advertorial in travel magazine Premium Guide focused on “higher income class” with winter promotion of SWISS, Rigi, SGV, Jungfrau Bahnen, MOB, RhB, Engadin Scuol, Samnaun, Montreux, Schilthorn, Pilatus, Davos Klosters, Zermatt and Aletsch Arena
- 12. 12. – 3/1 Winter promo in deluxe travel magazine Premium Ski 12/2022 with promo of GTToS, Bernina Winter Panorama by RhB, wellness at Rigi, Davos Klosters Premium Card & Spengler Cup, Pistenbully experience by Zermatt Bergbahnen, Early Birds offer in Aletsch Arena, cross-country ski in Val Muesta, Via Silenzi snowshoe hiking in Engadin, Nostalgic fondue rides by Rigi-Bahnen, brunch with SGV and Snowpenair at Maennlichen by JFB
- 15. 12. – Switzerland partnership with Alpenverein print yearbook 2023 with promotion focused on summer (2 pages), winter (2 pages) and Swisstainable (2 pages)
- 15. 12. – Samnaun and Scuol winter promotion in e-newsletter by premium magazine Estate (focused on premium experiences, attractions, products)
- 20. 12. – Advertorial presenting winter activities for skiers and non-skiers placed at one of biggest newspaper website portal - denik.cz (Davos Klosters, Aletsch Arena, Jungfrau Zermatt, Lower Engadin incl. Scuol and Samnaun, Rigi with SGV and RhB)
- 20. 12. – On-line banner campaign focused on Davos Klosters and its winter possibilities placed at website SNOW.cz and its mobile version
- 28. 12. – Advertorial presenting winter possibilities with RhB (BEX, GEX, sledging with RhB, Landwasser with hike, Davos Klosters with ski, RhB map with snowshoe hiking, STS tickets) placed at Forbes.cz (website of the magazine Forbes in Czech language)

KAM

- 15. 12. – KAM campaign focused on promotion of Davos Klosters and RhB activities via TO Experitour and its digital channels (website, online banners, social media channels, Google Adwords, Seznam Sklik) with our logo and website promotion
- 19.12. – ST Christmas networking meeting with media representatives and tour operator / travel agencies representatives in our Prague office during day (event organized together with HST for their members)

KMM

- 1. 12. – Intl. media trip GoldenPass Panoramic (1. - 4.12.2022) with two journalists from Czech market – Mr. Petr Cermak from MF DNES (one of the biggest and most known newspapers) and Mr. Jan Sura from website portal Zdobry.cz (highly popular newspaper website portal focused on transport)

Future Activities

- ST Newsletters (B2C & B2B)
- various media trips



- various advertorials
- website branding Forbes.cz
- PR article at travel website Travel Fever
- B2B promo winter campaign focused on Davos Klosters with TO Experitour
- Video promo via Czech Railways in its VIP lounges at selected train stations
- Video promotion in shopping center OC Flora in Prague



2. Active Markets

INDIA

Market Situation

Various circumstances experienced in the first part of the year, as already reported, were obstacles to a real market recovery (validity of vaccination certificates for third countries, delay of the booster in India, and later the difficulties encountered by all countries with regard to visa supply). What has been seen in recent months, however, is an extension of the classic main season (typically, about 70/75 percent of Indian market overnight stays are recorded between April and June). Among the possible reasons: those who have been unable to obtain visas for the classic vacation months have postponed their trips. At the same time there is an increase in the interest of tour operators and clients in the summer season, more typical destinations for winter, Christmas markets, etc. And also to a tourist who seeks even more quality and is therefore willing to spend more for worthwhile experiences and even longer stays.

Another positive aspect is that there is an increase in the average length of stay. When we have complete statistics for 2022, we will be able to make a more precise analysis.

As for MICE, the positive trend continues here as well. Groups were also made in the last months of 2022 and there are already as many confirmed groups for the first half of 2023.

Since the end of October SWISS has resumed daily flights from both Delhi and Mumbai. At the same time, almost weekly, other airlines are reporting new connections to Europe or the Gulf countries (thus increasing the possibilities and connection options for Switzerland as well).

On the other hand, as far as the visa situation is concerned, it has definitely improved (of course, not being high season). Our Embassy is making great efforts to prepare for the 2023 season, and there is a very good chance that next year will be the real recovery of the Indian market. There are of course external factors beyond our control, among them, what other embassies will do from a visa perspective (capping yes or no?), inflation (cost of flights, cost of hotels, etc.). Although this last factor does not seem to affect our target audience.

So, great signs of optimism are coming from across the industry for the upcoming 2023 season, which is now approaching.

Campaigning & Activation

KAM Leisure:

- Ad promoting the webinars for Lucerne and Titlis. 2 Ads in TravTalk prior to each webinar. The adds also contained a QR Code which could be scanned on a phone / tablet, and would lead directly to the webinar registration page. Total Contacts = 217200

B2C

1. Winter Wonderland:

- We participated in Hamley's Winter Wonderland - an event filled with high end consumers and the ultra HNI category of Mumbai, consisting of our main target audience of families.

- Our photo booth created at the event was a 2-sided booth with different experiences - a life-size Snow Globe on one slide and the other had a winter set-up with fake snow making it attractive for kids



as well as the adults.

-The Amplification and promotion of the event was through outdoor, print & social media.

The photo opportunity was a big hit with visitors standing in line with a minimum wait of 20 mins to get themselves clicked. At the live stage, we had interactive quiz sessions with children and parents winning Swiss chocolates, which created brand recall.

- We also had a contest running at the both for which we created a landing page on [MyS.com](https://mys.com) and asked people visiting to scan the bar code and participate.

- **Total number of people who attended the event: 80k – 100k**

2. Double Page Print Advertisement in magazine:

- Neeraj Chopra Advertisements were published in travel and lifestyle magazines namely:

a. GQ

b. India Today Spice

c. T+L Ad

d. Vogue Ad

- Total Circulation: **561'500**

- Total Contacts: **2'807'500**

3. Native Article:

- Neeraj Chopra native stories were published on Travel + Leisure, Indiatoday.in, vogue.in, conde Nast Traveller India.

- The stories were published to promote and highlight the Neeraj Chopra campaign.

Total reach: **3'363'653**

KAM

KAM Leisure:

- 2nd Nov 2022: Destination training in Bangalore where Switzerland and its various touristic offerings were presented to the trade in attendance. Presenters were ST, STS, Rail Europe, BLS Interlaken, RhB, Aletsch Arena (Virtual) & Zurich Tourism (Virtual). Total no. of attendees = 86

- 4th Nov 2022: Destination training for the travel trade in Pune highlighting Switzerland and its various touristic offerings. Presenters were ST, STS, Rail Europe, SWISS, Jungfrau Railways, Aletsch Arena (Virtual) & Zurich Tourism (Virtual). Total no. of attendees = 84

- 15th Nov 2022: Destination training in Nagpur where Switzerland and its various touristic offerings were presented. Presenters were ST, STS, Rail Europe, Jungfrau Railways, BLS Interlaken & RhB. Total No. of attendees = 47

- 17th Nov 2022: Destination training for the travel trade in Ahmedabad. Presenters included ST, STS, Rail Europe, Jungfrau Railways, BLS interlaken & RhB. Total No. of attendees = 107



- 23rd Nov 2022: Visa Event with “Preferred Partners” of the Embassy of Switzerland Visa Section in Delhi to put systems in place for the 2023 and future travel seasons, and to establish the base for the Vosa Preferred Partner Scheme (VPPS). ST, SEM, VFS, FDFA and Visa Section representatives participated along with key decision makers from TAs / TOs SWISSstours, Thomas Cook, SOTC, D’Pauls and MakeMyTrip.com. Total No. of attendees = 10

- 25th Nov 2022: Visa Event with “Preferred Partners” of the Embassy of Switzerland Visa Section in Mumbai to put systems in place for the 2023 and future travel seasons, and to establish the base for the Vosa Preferred Partner Scheme (VPPS). ST, SEM, VFS, FDFA and Visa Section representatives participated along with key decision makers from TAs / TOs SWISSstours, Thomas Cook, SOTC, Veena World, Kesari Tours and Flamingo Transworld. Total No. of attendees = 10

28th Nov 2022 - 2nd Dec 2022: Sales Calls with Schilthorn Cableway Ltd. across New Delhi, Chennai & Mumbai in order to present Schilthorn, its various offerings and latest news / updates to key travel agents.. Total no. of TOs / TAs met = 23

- 6th Dec 2022: Webinar highlighting Lucerne and its various touristic offerings. Presentations by Lucerne Tourism, Lake Lucerne Navigation Company and Pilatus. Along with presentations, webinar contained live polls, live Q&A session and quiz at the end. Total no. of attendees = 535

- 13th Dec 2022: Webinar highlighting Titlis and its various touristic offerings. The webinar consisted of presentation by Titlis Cableways along with live polls, live Q&A session and quiz at the end. Total No. of attendees = 542

MICE

- November - Sales call to Corporate clients and MICE agents in Kolkata
- December - Asia Trophy 2022. 10 MICE agencies participated
- December - Networking meetings with corporate and MICE agencies

KMM

1. Winter Christmas Market Media Trip.

For the Winter Christmas Market a trip we had 5 journalists travelling with us in the month of December to promote soft winter activities and Christmas markets.

The media articles for the same will follow.

Future Activities

KAM Leisure:

- STMS 2022: 5 agents who sell winter will participate
- Sales calls in BOM & DEL

MICE

- Optimise event in Delhi 12th January 2023 - one to one meetings with corporate clients
- Sales call in Mumbai & Delhi
- Sales call and receive visit (Womens day event) to Bangalore

Campaigning & Activation:

- Neeraj Chopra Campaign



2. Active Markets

JAPAN

Market Situation

November and December has been very busy for the travel agents who started selling full force while finalising their brochures for 2023.

Bigger agents are relying on tried and tested products while middle and small sized agents are looking for new products. With the yen being very weak against all major currencies, travelling has become up to 23% more expensive within the past three years. Nevertheless, agents report that Switzerland has been the best selling destination in Europe.

Campaigning & Activation

- 1 November - 1 December: Manga campaign with Rakuten. a how to travel Manga in six episodes was distributed via twitter and a special landing page on Rakuten (the Japanese Amazon). The campaign reached 2.6mio wealthy millennials.

- Plenary discussion with Martin Nydegger and other players in the Japanese travel industry about sustainability in Tourism. The discussion was on the occasion of the visit of a parliamentarian group from Switzerland and was followed by a networking lunch.

- December: Presence at various Christmas markets to showcase Swiss Christmas season.

- 19 November: Run to St. Moritz - community event to highlight St. Moritz as a trail running destination to Japanese Runners.

- Newspaper advertising with Hankyu (one of the biggest travel agents) for a high-end tour to Switzerland in the Nikkei Japan (one of the biggest newspapers of the country).

- Programmatic ad campaign for Swiss Travel System and Schilthorn targeting the millennial market.

KAM

- 17 December: Sales support for Swiss mono luxury tour product by Hankyu Express with ST's message and logo on 1 full page advertisement on The Nikkei newspaper.

- 8-15 December: Luxury Fam trip with Leading Hotels of the world and 4 high-end travel agents to Lausanne, Zermatt, St. Moritz and Zurich.

- 15-20 December: Winter fam trip for travel agents to put the winter season in Switzerland on the map. 5 agents joined the trip to Interlaken, Jungfrauoch, Grindelwald, Thun and Montreux which also included the new Golden Pass Express.

- VIP dinner with Martin Nydegger and selected key accounts on 8 November.

- Two newsletters to the Key accounts: one with news from all partners and ST and one focusing on Swisstainable.



KMM

Media Trip:

- International media trip 'Golden Pass Express' in Jungfrau Region and Montreux from 1-4 Dec. participated by a Japanese journalist for Travel Vision.

Media Event:

- Media winter launch event in Tokyo on 8 November with attendance of Martin Nydegger and 33 journalists for introducing winter attractions and partners news.

Media eNewsletter:

- Sustainable eNewsletter delivered to 676 media contacts on 30 Nov.

- 3rd Media eNewsletter 2022 with news from partners delivered to 671 media contacts on 23 Dec.

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. (extended broadcasting until Dec.)

- TV Asahi News, key TV station reports about RhB the longest train Guinness record.

Magazine:

- 'Stuben' ski and snow culture magazine introduce an essay by Masayo Oshio, ST Japan about sustainable lifestyle in Switzerland.

- 'GOETHE', men's lifestyle magazine introduces about Grindelwald as one of the world best winter resorts.

- 'Safari', men's lifestyle magazine introduces Kulm Hotel Gornergrat as the hotel with superb view.

- 'Japan Railway Fan', train magazine reports about RhB the longest train Guinness record, new GoldenPass Express, Rigi and Pilatus Railways as the result of Int. media trip 'World Records'.

Online:

- Travel Voice, online travel trade news reports about ST Japan's media winter launch.

- Yomiuri Online, key newspaper reports about RhB the longest train Guinness record.

- FNN Prime Online, online news portal reports about RhB the longest train Guinness record.

- Travel Voice, travel trade daily news reports about RhB the longest train Guinness record.

- Yahoo! News reports about RhB the longest train Guinness record.

- Travel Vision, travel trade daily news reports about new GoldenPass Express, Christmas market in Zurich and Montreux as well as Swiss Veggi Day, as the result of Int. media trips.

Newspaper:



- Local newspapers (MutsuShimpo, Yamanashi Nichinichi Shimbun, Iwate Nichinichi, Seikyo Shimubun) report about RhB the longest train Guinness record.
- Mainichi Shogakusei Shimbun reports about RhB longest train Guinness record.
- The Nikkei, the largest financial newspaper reports about RhB the longest train Guinness record as the result of Int. media trip 'World Records'



2. Active Markets

KOREA

Market Situation

[Economy]

The South Korean economy is forecast to grow less than 2 percent in 2023. The Ministry of Economy and Finance and the Bank of Korea (BOK) estimated this year's growth rate at 1.6 percent and 1.7 percent.

[Tourism]

The overseas travel market is moving very actively. In particular, in Europe, while focusing on new destinations or themed products, HAs are paying attention to products that combine destinations and themes regardless of the season.

[Covid-19 Update]

- Barrier-free traveling overseas from Korea
- Existing indoor-mask mandate is also being re-considered by KDCA if criteria are met.

Campaigning & Activation

Social Influencers' Trip to Switzerland to explore Switzerland during Christmas

- Period: 19 Nov. – 28 Nov.
- Partners : Lake Geneva, STS, Basel, LLR
- No. of Influencers: 2 pax @seosum @no_hooni
- 231.4k followers / 14 posts
- KPI : 11,672,971

Haha Tour in Switzerland

- Period : Sep.10-Oct. 1
- Partners : Matterhorn Region (SaasFee/Zermatt/AletschArena/Leukerbad)
- No. of Influencers : @rawoojinu / @kkachi99
- 8 posts / 1.2mil followers
- KPI 16,601,857

- 2 celebrities (Song Jingo & Yoo Saeyoun) traveled to Switzerland for a TV shooting during 2 nights and 3 days. The Instagram reels post which they filmed in-between the tv shootings had a huge impact all over the world with one reels reaching up to 14.3mil.



KAM

Workshop with STA Study Trip Members

Date: Nov. 17th, 2022

Participants: 12 KAs, 1 LH, 2 ST

Program:

- Sharing the best itineraries during the trip
- Product suggestions for 2023

KMM

Media newsletters to 650 journalists in November & December respectively

- Major Results:

Romantic Winter Activities (31/Oct)

ride&slide and sleep25 (05/Dec)

Results from International Media Trip "Swiss Records"

- Total Media Contacts: 5,000,000

Results from TV show, KBS2 "Battle Trip"

- Aired on 10/Dec (Saas-Fee/Zermatt) and 17/Dec (Leukerbad/Aletsch Arena)

- Audience Rate: 4.5% * 2

- KPIs: 4,500,000 contacts

- Total Number of the generated articles: 51

- Total Media Contacts from the generated articles: 40,179,000

Future Activities

STA Application

- 17th STA application amongst major KAs



2. Active Markets

NORDICS

Market Situation

So far, the Nordic economy has shown unexpected great resilience. Looking ahead, however, households will be under mounting pressure from rising interest rates, high inflation, and energy shortages. Economists have thus lowered their growth outlook for 2023 and 2024 and the risks in their forecast are on the downside, linked to various consequences of the war in Ukraine and the possibility that central banks may be underestimating the interest rate sensitivity of their economies. GDP growth forecast for Sweden has been lowered to -1,5% in 2023, followed by a 1.3% increase in 2024. Swedish inflation will peak at above 11% early next year and unemployment will climb above 8%. The Norwegian economy is currently best performing in the market.

Campaigning & Activation

NO - Fri Flyt, Advertorial + Digital Native

Davos Klosters

SE - Åka Skidor, Digital Native

Engelberg

NO - Aftenposten/VG, Digital Native

Engadin

FI - Mondo, Digital Native

Recovery, Ticino

FI - Mondo, Digital Native

Recovery, E-Grand tour

SE - Gp.se, Digital Native

Recovery, Valais

DK - Berlingske, Digital Native

Recovery, Valais

SE - Freeride.se, Standalone newsletter + Topscroll Adnami

Recovery, Valais

SoMe Fb partner campaign 1st wave, Awareness

Mürren, Schilthorn, Zermatt, Engadin



KAM

TRADE

Individual Fam Trips

- Site Inspection, Champéry, 10-13/11 Alpe, 1 pax

Events

Sthlm Days, Stockholm, 24-25/11

- VIP Event, 22 Key Account A from all the Nordic countries
 - [aprei'ski:], 71 participants, KAM, KMM
 - Crea Workshop, 21 participants, KAM, KMM & Partners
- Dicussions about

ST & Andermatt in Helsinki 8/12

- KAM & KMM event with Andermatt in focus, 27 participants

KMM

Press trips:

SE - Marko Wramen

Zermatt, Filisur, Grindelwald



2. Active Markets

POLAND

Market Situation

Politics:

The right-wing Polish government has declared that they will accept the EU commission's conditions and take back some reforms to the Justice System, that the EU has declared to be in violation of European standards. Warsaw is being accused of compromising the independence of the judicial branch of government, especially by implementing a disciplinary chamber for the removal of judges that would be very much under the influence of the ruling political party. Poland, after over a year of refusing to bow to the pressure, now wants to get rid of this chamber in order to unlock up to 36 billion € from the EU Covid relief fund for the member states. In addition, Poland has already been fined over 300 million € by the EU for not complying with EU law. Analysts doubt that after receiving the funds, the government will not try again to toughen their grip on the Justice System.

Meanwhile, President Andrzej Duda, who was a member of the ruling party before becoming the Head of State, is positioning himself a little more independently. He repeatedly now vetoed a new law that was trying to widen political influence over the school system.

Economics

For the first time in many months, inflation in Poland has come down slightly. The rate shrank to 17,5% year on year in November, after hitting a 20-year high of 17,9% in October. The rate for December is expected to slide some more, mainly because of lower fuel prices. It's still unclear if the downturn already marks a change of the overall trend.

Consumer confidence is picking up slowly. Retail sales in November - adjusted for inflation - grew by 1,6% year on year.

The Polish currency, after losing ground over the year, has regained some strength. Before Christmas, one Swiss Frank stood at around 4,70 Polish Zloty after surpassing the 5,00 Zloty line during the autumn months.

Campaigning & Activation

- ST calendar 2023. Our ST wall calendar. Autumn colours of Switzerland

Pictures of PL photographers visiting Switzerland in autumn, 1'500 copies.

Distributed among partners, individuals, KAM, KMM, embassy etc.

Used by photographers as a prize for their insta followers

- Campaign with Snow Trex, monthly campaign with winter offers. SoMe activities (IG, TikTok, LinkedIn), Newsletters, Online branding, Online and print articles about Swiss winter

- Branding on wyborcza.pl. Weekend branding, 18–19 November. Display creations – winter inspiration: ski & snb, winter activities. Link to MyS winter

Views: 1'430'000



- SoMe activities: paid campaign for partners Pilatus, Schilthorn, Zermatt – topic Xmas market, skiing attractions, movie. Reach in November almost 520'000

- SoMe activities FB. Posts promoted on our ST autumn and winter topics. Our ST Key Visuals and link to MyS. Winter mood film 34'000 views in November

Posts reach 210'000 in November

- ST winter campaign with eSky.pl. First wave of online activities with eSky, lasting 3 months. Online portal offering flights, accommodation to Switzerland

SoMe Instagram and Facebook, posts and stories, Web/app push, banners.

Final results at the end of the campaign.

- ST fence exhibition, with winter activities in Switzerland, on the fence of the Embassy. 17 panels presenting skiing, sledging, touring, Swiss traditions

One panel with a map and skiing destinations in Switzerland, QR codes leading to our MyS/winter, December reach in busy before Xmas time around 200'000

- Swiss day by SIX. Special lunch organised to celebrate 5 years of Swiss company SIX on PL market with 140 participants. Lunch - typical Swiss raclette. Presence of Swiss Ambassador in Poland, speech about Swiss food

ST materials: wall calendars, maps, movies from Switzerland on the screen . Info about event on SIX linked in profile.

- SoMe activities for partners, Paid campaign for partners, Schilthorn, Zermatt – market partners, skiing attractions, movie, continuation of November activities. Reach in December almost 370'000

- SoMe activities for ST. Posts promoted on our STFB account - winter topics

Winter images, Snow Application. Link to MyS/winter. Winter mood film 12'000 views in December. Posts reach 330'000 in December

- NL B2C for November and October

KAM

- Training for agents by Snow Trex, November. Platforms wakacje.pl and travelplanet.pl selling skiing offers. Presentation about Switzerland and dedicated offers. 370 participants (in person and online)

- Webinar for agents of Nekera, one of the leading TOs in Poland, December 2nd. Online webinar for agents selling skiing offers. Presentation about winter in Switzerland and dedicated offers. Swiss partners included: Davos Klosters, Zermatt, Schilthorn. 180 participants, webinar recorded and shared in NL after the live meeting

- Business plans with TOs. Winter activities promo by Allegra, Snow Show, Hey Holiday, Nekera, Taksidi, Wild Holidays. Online activities promoting Swiss winter offers, SEM, Social Media, Newsletters. Promotion of winter season lasting until April.

KMM



- Media meeting November, 9th November, 23 participants, Winter presentation

with TO's presence, discussion on Swiss offers and trends. Partners' news – Davos Klosters, Zermatt, Schilthorn, Pilatus. Fondue served – Swiss winter mood.

- Mini-international trip - RhB world record, 1 pax from Poland - journalist from onet.pl, one of the biggest horizontal portals. SoMe activities by participant in his own SoMe and by onet.pl. Online article after return published in travel section.

- Influencer trip to Davos Klosters with Wild Holiday, 14. - 17.12

7 influencers with different backgrounds, also family focus, In cooperation with VÖLKL skies. Focus on skiing and winter vibe. SoMe activities on spot via Instagram and TikTok. Dedicated commercial for offer of Wild Holidays

Future Activities

- Media trip with eSky.pl in January

- Snow Edition, STMW in January with 7 participants

- Group skiing media trip in January, with 6 participants

- Business plans with TOs

- Yearly meeting with media in February

- Business lunch with TOs at the residence of Swiss ambassador.



2. Active Markets

RUSSIA

Market Situation

Economics

International experts predict a decline in Russia's GDP by 3% in 2022, plus another 2%-4% down in 2023. The available data is very controversial also given the key data of the Russian real economy is not published. Inflation is between 12-16% in 2022 and is expected to accelerate in 2023.

Outbound travel

Switzerland Tourism does not conduct any marketing activity in Russia.

The industry functions according to the availability of flights and destinations. Russian borders are open. Schengen visas for Russian tourists are still available from the key European states including Switzerland. Those tourists who are ready for an extremely expensive and long flights keep visiting Europe, but most of luxury clientele travel for leisure to the UAE, Qatar, Maldives, Seychelles, Thailand and Turkey. Apart from domestic luxury resorts in Sochi, Altai, Karelia and Kazan, Russian tourists for the first time started to explore the nearby counties of Belarus, Kazakhstan, Uzbekistan and other CIS countries. Key luxury hotel representative agencies are active in Russia and CIS: Ars Vitae, Bright Connections, Top Signature and are conducting sales activities also in Dubai for the Russian diaspora there. TMI Consultancy agency has frozen its operation.

Status of the key competitor NTOs in Russia:

Atout France: 4 employees based in Moscow, no activities in Russia, active on CIS (Armenia, Georgia, Azerbaijan, Kazakhstan and Uzbekistan) Webinars, sales calls, events on Leisure.

Visit Britain: Moscow office is closed, Moscow team work from Dubai, responsible for Middle East, India & CIS.

Spain & Catalonia NTOs are active in Russia and CIS with KAM events.

German and Austrian NTO offices are closed, no info on ENIT.



2. Active Markets

SOUTH EAST ASIA

Market Situation

The strong recovery trend in Southeast Asia is confirmed with a strong growth of +25% compared to pre-covid levels from July to October.

The booking trend for November and December is good and should continue with the growth, also its rate may slow down due to the reopening of more traditional destinations (i.e. Japan, Korea, Taiwan).

ST SEA launched its winter campaign with a specific on Malaysia and Indonesia.

We expect to close the year with a recovery rate of approx. 90%.

Best practice competitors

Taiwan, Hong Kong and especially Japan relaunched aggressive marketing campaign aiming to gain back visitors from Southeast Asia as soon as possible. Japan winter destinations are recapturing traditional market shares for winter sports travellers.

Campaigning & Activation

- Winter campaign on Grab with Roger Federer run in Malaysia and
- ST/STS Winter: Google Ads Campaign
- ST/STS Winter: OOH Digital Billboard campaign in Kuala Lumpur (1-30 Nov)
- ST/STS Winter: Sales push with KKday in SG, TH, MY
- ID: Winter public event - SwissCham Golf Tournament
- SG: Winter public event - EHL Singapore Open Doors Weekend
- Content Distribution Winter in Nov/Dec for 6 Swiss partners (4 articles)

KAM

- ST/STS Winter: Presentation with RE GSA in Jakarta in November
- ST/STS Winter: Presentation with RE GSA in Kuala Lumpur and Johor Baru in December
- SEA Winter Trade Webinar on 24 Nov
- TH: 3 Nov - Trade Luncheon with Martin Nydegger in BKK
- TH: 3 Nov - VIP Reception with Martin Nydegger in BKK



- SG: 4 Nov - VIP Reception with Marting Nydegger in SG
- TH: 22 Nov - Visa Workshop with KD/SEM/ST Delegation
- TH: Winter business plan with One World
- SCIB: Asia Trophy with 31 SEA participants
- SCIB: Carried-out business in Dec: 1898 overnights
- PH/VN: ST/STS Online Agency Trainings
- ST/STS Sales calls tour in Jakarta and Kuala Lumpur
- SG: ST/STS Christmas Gathering with Travel trade
- 3 STA Fam Trips with 12 participants from 6-12 December

KMM

- TH: 3-Nov Winter Launch with Martin Nydegger
- SG: 4-Nov Winter Launch with Martin Nydegger
- 30 Nov: Winter Launch media briefing (Online)
- Winter Listicle on TTG for travel trade
- Media Trip: Malay Celebrities “Winter Wonderland” with Universal Traveller

Future Activities

20-24 February: STE Southeast Asia in Phuket with 80-100 buyers from SEA and 30 Swiss suppliers

Interesting observations

Taiwan, Hong Kong and especially Japan relaunched aggressive marketing campaign aiming to gain back visitors from Southeast Asia as soon as possible. Japan winter destinations are recapturing traditional market shares for winter sports travellers.



2. Active Markets

SPAIN

Market Situation

Travel Behaviour

According to the last survey of the INE (national statistics institute) Spaniards spent on travel during the third quarter of the year 21,026 million euros, 9% more than in the summer season of 2019, before covid, despite the number of trips is still slightly below then.

As every year the long weekend early December was the perfect time for a citybreak in our xmas markets. This year TO's confirmed a clear increase of bookings in Montreux/Lausanne, Basel and Zurich

Spain projection note OECD Economic Outlook November 2022

Activity is projected to grow by 1.3% in 2023 and 1.7% in 2024, after increasing by 4.7% in 2022. High inflation will curb household purchasing power, but savings accumulated during the pandemic will support

consumption. With deteriorating demand prospects and rising financing costs, private investment is expected to remain subdued. Inflation will peak at

8.6% in 2022 and then decline to 4.8% in 2023 and 2024.

Campaigning & Activation

Distribution ST Magazine White - 350'000 mktg contacts

30'000 copies in the weekend supplement of the catalan newspaper La Vanguardia together with 2 pages paid advertorial in the entire print run - 140'000 copies

Bern's xmas markets at Viajes National Geographic - 751'800 mktg contacts

Extended online advertorial with video, image gallery and a map about Bern with Spain's leading travel magazine. Additionally SoMe posts reaching more than 400'000 accounts.

No. 1 Twitter account in Spain @Pedro_Torrijos discovering Zurich

Pedro is a famous architect that travelled to Switzerland to discover its architectural treasures and curiosities. He created a fantastic TW thread in Twitter and @culturainquieta, a top IG cultural account, published its content too. A campaign with over 3 M contacts and 361'000 intereactions

Content Creator @Tiempoderezas visits Basel

Erea is known for her artistic photography and a great sense of style and esthetics. She traveled to Basel to visit the architectural and cultural attractions of the city linked to the Christmas market. Publication of a post, various reels and stories in IG, as well as a very complete post in her blog pushed through her own newsletter. We reached 241'000 mktg contacts with 2.8% ER

Podcast Blum at TimeOut Madrid and Barcelona



Together with TimeOut we created a beautiful microsite. A train journey through our cities tracing blum's steps and highlighting the must sees of each city. The campaign included a highlighted box at their homepage (BCN + MAD) with 1.5 M unique visitors, a SoMe campaign in IG with 443.000 followers and 437.089 in FB and a dedicated Newsletter to 188.000 subscribers

Direct link to MyS.com/Blum with all the information and bookable citybreak offers

Heidi Paula Fernandez Ochoa at Lugares de Nieve

Paula is a very famous skier in the market and early year joined our Heidis Modernos family with a ski trip to Engelberg. As with all the other Heidis we produced with her a digital guide and promoted it with the snow site Lugaresdenieve.com & newspaper La Vanguardia. 1.3 M mktg contacts

KAM

RACC B2C travel show in Barcelona

The catalan car club with its own agency organized an event and ST participated with an information desk and a 20 minutes presentation about Switzerland.

B2C digital campaign with TO BTravel

Sales oriented campaign focused on Zurich's xmas markets with a a selection of bookable offers promoted through various channels. The campaign included some B2B presentations of the city.

B2C digital campaign with the travel platform Atrapalo

Sales oriented campaign to push Geneva's xmas packages through various channels (display, microsite, branded content, newsletter, some)

KMM

Mediatrips:

Que fem? Magazine from La Vanguardia to Basel, 11.-13.11

Fem Turisme Radio Program & Nice Magazine to Fribourg Region & Suisse Fondue Festival, 17.-19.11

Top Girona Magazine to Basel, 25.-27.11

Influencertrip @tiempodecerezas to Basel, 25.-28.11

Top Coverage:

20min.es, online daily newspaper, "El tren más largo del mundo recorre los Alpes", 1'586'000 media contacts

Lavanguardia.com, online daily newspaper, "Saunas flotantes, él ultimo capricho para disfrutar el otoño en el lago de Zúrich", 1'594'000 media contacts

Viajes National Geographic, online travel magazine, "Suiza consigue unir Montreux e Interlaken en un revolucionario tren panorámico", 417'601 media contacts



20min.es, online daily newspaper, “Verbier, el mejor destino del mundo para esquiar”, 1’586’000 media contacts

Elpais.com, online daily newspaper, “Ginebra: un viaje entre relojes, el doctor Frankenstein, átomos y fondues”, 1’919’250 media contacts

La Razón, daily newspaper, “Zúrich: vanguardia natural”, 205’688 media contacts

La Vanguardia, daily newspaper, “A bordo del Glacier Express: los Alpes a cámara lenta”, 323’099 media contacts

Miradas Viajeras, local tv program, “Trenes panorámicos”, 150’000 media contacts

Total media contacts: 7’781’638



3. Emerging Markets

OTHER

Market Situation

EMERGING MARKETS - Review 2022

In general: The situation in all the Emerging Markets was very unstable. The pandemic has given a further downturn to tourism. The outbound traffic started slowly to growth again.

Iran: The country has suffered from the pandemic and later in September the riots inside of the country made it very unsecure. TOP5 in Tehran + 1 in Shiraz were active during the Summer and succeeded to bring traffic to Switzerland. The situation became during Q4 very difficult, once the Swiss Embassy could not fulfil the visa applications for 2 months.

Israel: The country did recover from the pandemic. The travel restrictions were lifted progressively. The recovery campaign was conducted all year long. Several TO came for site-inspection to Switzerland.

Ukraine: The positive approach for Ukraine in the first 6 weeks of year came suddenly to an end after the war started. All activities were stopped abruptly.

Turkey: Normality came back in the country. Turkish Airlines has resumed most of the international operations throughout the year.

Balkan Countries: The situation is different in each country. The potential for outbound travel increases..

Baltic States: The interest out of the Baltics States is increasing.

South America: The situation remained throughout the year very complicated. The pandemic and the political situation have continued to affect Argentina, Peru, Chile, Columbia and Ecuador as well as Central America. The difficulties linked to politic, economy and social aspects are still present. SWISS has extended its flight to Sao Paolo to Buenos Aires.

Central Asia: The pandemic kept the visitors away. The market is recovery (espially KZ after the riots early January. A special program for the Medical/Health Secotr was conducted during Q2.

Best practice competitors

EMERGING MARKETS - Review 2022

The tours operators still believe in Europe as an attractive destination for leisure, business and corporate travel. Switzerland has a high esteem. Switzerland remains an expensive destination. The offered quality and the visa facilitation process are essential to continue to promote Switzerland. The Grand Tour/Grand Train Tour of Switzerland remain a key USP. Cooperation with tour operators and key travel agents is active. We focus on FIT and high segment. Business, Education and Medical Services will continue to be essential in our promotion. APW and STM Luxury were successful.

Campaigning & Activation



EMERGING MARKETS - Review 2022

Israel: Recovery promotion in 2022 (print & online) was done in cooperation with Passport Group with good results.

Croatia&Slovenia: Summer and Winter promotion in Auto Fokus and Ski Fokus Magazines

KAM

EMERGING MARKETS - Review 2022

Iran: TOP5 are still operating and considered the most efficient operators for the country. IN addition we tried with success the extension of one operator in Shiraz.

Israel: The operators have changed during the pandemic. To regain the confidence a lot of trust must be given.

Turkey: The wish to improve is present, the implementation requires patience and language skills.

Argentina: Tour operators for the luxury segment have more affinity for Switzerland.

KMM

EMERGING MARKETS - Review 2022

Argentina: no media travelled to Switzerland. Several reports were done with previous knowledge and material.

Israel: In combination with the recovery campaign we succeeded to publish advertorial 6 times in Passport News. Several journalists attended the international media trips.

Future Activities

EMERGING MARKETS - Outlook 2023

Based on the new strategy for the Emerging Markets a split has been introduced starting 2023.

- Emerging Markets (South America and South Africa) are under the leadership of Pascal Prinz.
- Emerging Markets (Iran, Israel and South East Europe (incl. Turkey)) stay under the management of Federico Sommaruga.

A calendar of activities will be proposed to the partners on a on-going approach based on the political situation.

Interesting observations

EMERGING MARKETS - Review 2022

The tour operators still believe in Europe as an attractive destination for leisure, business and corporate travel. Switzerland has a high esteem. Switzerland remains an expensive destination. The offered quality and the visa facilitation process are essential to continue to promote Switzerland. The Grand Tour/Grand Train Tour of Switzerland remain a key USP. Cooperation with tour operators and key travel agents is active. We focus on FIT and high segment. Business, Education and Medical



Services will continue to be essential in our promotion. APW and STM Luxury were successful.