



Market Updates

January/February 2023

Editorial

Dear Partners,

After promising December results, February finally welcomed the eagerly awaited 2022 overall overnight figures – and they did not disappoint.

With 38 million hotel overnights achieved in total, the Swiss tourism came only 3.3% short of the 2019 figures. Some markets effectively already reached pre-pandemic levels. Guests from Europe are once again approaching the record figures of 2019 and the home market Switzerland even beats these. Guests from Asia follow suit, albeit with a focus on other forms of travel, longer stays and new countries of origin.

The first months of the year saw numerous sales oriented b2b activities in the markets. The 2023 Switzerland Travel Mart Snow (STMS) was hosted in Zermatt and successfully brought together 127 worldwide buyers with 100 Swiss suppliers, whereas the biggest delegations originated from the UK, Emerging Markets, and the Nordics. A total of 36 nationalities were represented. A qualitative survey ultimately confirmed the importance of such events for future business deals; the degree of satisfaction from both buyers and suppliers was at its highest.

All the best,

Corinne Genoud
Head Market West



1. Priority Markets

BENELUX

Market Situation

Travel outlook and situation:

A study conducted at the beginning of February on Dutch people's travel plans for the coming summer provides interesting and positive insights and forecasts for the upcoming summer season. The most important findings:

Next summer, about three-quarters of the Dutch want to take a holiday of a week or more. This means that the level before the COVID-19 crisis has been reached again.

Dutch people continue to go on holiday despite the worse financial circumstances. Covid isn't an issues anymore for 60% of the travelers. City Travel reaches very high results: 45% of the Dutch want to do a city trip. 60% haven't booked their vacation yet and almost 50% plan to book between March and Mai.

Specific to Switzerland: 53% consider Switzerland an attractive to very attractive holiday destination. 55% would like to go hiking in the mountains, 46% would like to visit cities and 35% would like to go on a panoramic trip.

The full report can be requested at ST BeNeLux.

Campaigning & Activation

Meetings

Netherlands:

Meeting Magazine Villars Gryon Diablerets Bex article eNewsletter 7000 ex and website 10'000 views pro month.

High Profile Cooking Workshop article eNewsletter 37'000 ex and website 50'000 views per month.

Belgium & Luxembourg:

Boardroom Magazine: 2 pages about Adventure Travel World Summit in Lugano 7'500 ex

- eNewsletter sent to SCIB Database (1'565 contacts): 26/01: Winter time pleasures.

- eNewsletter sent to SCIB Database (1'535 contacts): 23/02: Standalone Bern and region

Winter Marketing

Netherlands:

-ACSI Winter Camping shooting for excl. Bern Campaign in winter 23/24.

-Winter Snowplaza: Exklusive Key Partner Winter promo VWP (8 Wallis Destinationen)



Belgium & Luxembourg:

Wintersportgids: 6-pages advertorial, online articles, newsletters, social media (423'801 marketing contacts), excl. campaign for Lake Lucerne Region + Andermatt

KAM

Meetings

Netherlands:

AMEX InterAction 31./01-02./02 500 participants Leonardo Royal Hotel Amsterdam.

Belgium & Luxembourg:

Business lunch organized by Partance : 12 participants (agencies) at Penta Hotel Brussels

KAM

Netherlands

10.01. Event Travel Congress in Jaarbeurs, Utrecht

11.01. Event Trade day B2B in Jaarbeurs, Utrecht participating Swiss partners; STS, RhB and STC

15.-19.01. Event Winter STM in Zermatt, 7 participants.

KMM

Media Trips

Individual Trips:

Boardshortz.nl: Arosa-Lenzerheide

VAB Magazine: Engadin-Scuol

RTBF Un Monde à part: Région Dents-du-Midi et Alpes vaudoises

Wort Luxemburg: Flims-Laax

Group Trips:

Group Media Trip Winter Benelux Adelboden & Interlaken: 20 participants

Media Top Coverages

TV show VTM Belgium: Verliefd, verloofd, getrouwd in 24h: Lucerne Region

Trends-Tendances Belgium: GoldenPass Line



Future Activities

Winter

Shooting with ambassador & TV host Evi Hanssen in Bern and Valais

Cities.

Roularta and outbrain native advertising campaign for Lausanne

Sommer.

ANWB Camping Publication for Ticino online off line.

TV Broadcasting RTL4 Campinglive with key Partner Ticino and Bern.

SNP Oppad Wallis Summer push /publications

NKBV + SNP Hike day event with Key partners Wallis, Ticino an Made in Bern including workshops.

Roularta + NTFU Campaign to promote summer.

Social Media Campaign to promote Swisustainable Itineraries for summer.

NRC.nl + qualis (NL) to promote summer in Wallis.

KAM.

Publications on TravMedia channels in Belgium and Netherlands with focus Grand Train Tour of Switzerland, Swisstay and STS Excellence Programm.

Events TravDay in Belgium 30.03 and in the Netherlands 03.04. Participant Travel Agents +

Touropérateurs.

ANWB reizen new Grand Train Tour of Switzerland print and online

Meetings

Netherlands: Cooking workshop 30/03

Belgium: Study trip Davos: 9-12.02.2023



1. Priority Markets

FRANCE

Market Situation

After a 2.6% growth in 2022, France's national statistics bureau INSEE forecasts weak but positive growth (0,2%) in the first half of 2023 as well as slower inflation. The inflation can be felt as companies reported an increase in selling prices, but it was less pronounced than at the beginning of last year.

Emmanuel Macron's reform (raising the legal retirement age from 62 to 64) is still provoking a lot of strong reactions throughout France. Many strikes have taken place in the months of January and February which aim to keep up the pressure. In terms of tourism, France achieved "record" revenues in 2022 thanks to international tourism, nearing 58 billion euros. It exceeds its pre-pandemic level up by 1.2 billion euros compared to the 2019 level. The result that can be explained by "the return of European and American customers" but also by price increases, which "mechanically increases the revenue in value", according to Atout France.

Campaigning & Activation

SCIB:

- 12 articles publiés sur le blog. 21 398 visites sur le blog au total.
- Diffusion de l'e-news 01 "Louez une île ou d'autres lieux extra-ordinaires pour vos événements !" à 2 336 contacts. Ouverture unique : 728 / Taux d'ouverture : 31,69% / Taux de clic : 4,44%

Marketing :

- Organisation of a Networking event on 26.01.2023 on our winter rooftop redecorated with Swiss colours in partnership with the Swiss Embassy. More than 80 people with links to Switzerland and France were present. On the menu: Traditional Swiss dishes. The Ambassador and Alexa Chessex both made a speech during which they explained the positive synergies between our two countries.
- Organisation of an event in partnership with Swiss Wine on our winter rooftop on the 13.02.2023. The swiss wine was highlighted and promoted, with 6 winemakers present. 100 people attended to the event, some of whom won a competition in partnership with Timeout and some of whom were guests of Swiss Wine.
- Partenariat avec le compte Instagram Petaouchnok et le Valais : mise en ligne de 5 post mettant en avant le Valais. 700k reach et 20k par stories garanties.
- Skipass, skiinfo : campagne digital sur les 2 sites référents sur l'univers du ski.

KAM

SCIB :

- Inscription au Roadshow Marseille - Paris - Bruxelles avec Partance. Genève, très content des 13 contacts rencontrés à Paris. Une demande d'offre le soir de l'événement.



SCIB Belux qui nous a représenté à Bruxelles nous dit que pas de nouveaux contacts parmi les 12 clients présents, mais intéressant de revoir certains.

Celui de Marseille est reporté en mai à cause des grèves.

- Eductour à Crans Montana avec 7 agences, retours très positifs.

Loisirs:

Salon B2C à Brive-la-Gaillarde. Salon organisé par le réseau d'agences de voyages Fitour, présent dans le centre et l'ouest de la France. 2 conférences organisée sur les trains suisses pour promouvoir le package proposé par Fitour. Environ 1500 visiteurs, au moins 6 inscriptions sur salon pour la Suisse. Voyage proposé à deux dates en 2023. Le premier est plein, le deuxième en phase de l'être.

KMM

Un nombre exceptionnellement nombreux de voyages de presse ont eu lieu en Suisse en janvier et février 2023. Notamment des production télévisuelles telles que Echappées Belles et Chroniques d'en haut (France Télévision), ainsi qu'un reportage TF1 sur le Haut-Valais. Sur une période d'environ 1 mois, plus de 20 voyages de presse étaient en coordination chez Suisse Tourisme France.

Planification et préparation des événements de l'année, notamment sur les villes suisses prévue le 8 mars. Mise en place d'un dossier de presse dédié.

Future Activities

Campaigning & activation

SCIB:

- Webinaire 01 sur les nouveautés hôtelières
- e-news 02

KAM

SCIB :

- Pure Meetings & Events international
- Eductour à Basel

Loisirs:

- Salon Fitour à Aurillac

KMM:

Evenement Swiss Cities le 8 mars

Conception et envoi du dossier de presse Eté 2023 en avril



1. Priority Markets

GCC

Market Situation

-The GCCs are still booming like hell, especially in Dubai, even though oil and gaz prices came down slightly during the past months. Prices for luxury homes for exsample are in Dubai 44% higher than one year ago. Next to the oil & gaz income the GCC and especially the UAE also profit from a high influx of Russians and investments from all over the world.

Best practice competitors

-The Austria Middle East office opened up a representation in Israel, bringing around 20 Austrian suppliers and a Minister to Tel Aviv. Growth rates of Israeli guests in Austria are impressive.

Campaigning & Activation

- Launch of new Swisstainable guide. All Swiss destinations, special sections on nature, STS, hotels, strategic partners, visa and Swisstainable.
- Launch of new luxury and lifestyle brochure. 17 hotels and 6 destinations. Arabic and English, Print run: 10'000
- Launch of new family brochure. 9 hotels and 8 destinations. Arabic and English, Print run: 10'000
- 07FEB: Swiss Learning Event focussing on education possibilities in Switzerland at Swiss School Dubai. Around 100 parents participating.
- FEB-MAR: International School Days in 7 different schools in Dubai. Presence with banners, brochures, posters and Swiss Cheese. Total visitors: 10'000

KAM

-Race to Switzerland / STE from 28JAN-4FEB. 2 Speed Dating workshops. 72 Breakout Sessions. 4 Traditional workshops in Qatar, Kuwait, Bahrain and Oman. 440 GCC agents attended. 20 Swiss partner participated.

Future Activities

- 100% women event Abu Dhabi and press release: 8MAR
- Luxury Ladies Events Riyadh, Sharjah, Al Ain, Abu Dhabi and Doha: 11MAR-16MAR. 5 wome only events with 5 suppliers
- Discover Europe 28APR-1MAY. 110 suplliers from Switzerland, Ireland, Germany and Austria meet 110 buyers



1. Priority Markets

GERMANY

Market Situation

ADAC Tourismusstudie

Das Reiseverhalten der Deutschen normalisiert sich wieder, aber drei Krisenjahre haben Spuren hinterlassen, resümiert der ADAC das Ergebnis seiner Tourismusstudie 2023. 63% der Deutschen sind sich sicher oder halten es für wahrscheinlich, dass sie im Jahr 2023 in den Urlaub fahren werden. Im Vergleich zur Prognose in der Mitte der Corona-Krisenzeit ist die Reiseabsicht damit deutlich gestiegen. Sicherheitsmotive und intakte Natur sind wichtige Entscheidungsfaktoren für die Wahl des Reiseziels. Die Folgen der Inflation und der Energiekrise wirken sich unterschiedlich auf die Reismöglichkeiten der Menschen aus. Aber: Für 85 Prozent war das Urlaubsbudget im Jahr 2022 gleich oder höher. Obwohl eine intakte Natur am Reiseziel eines der wichtigsten Entscheidungskriterien bei der Buchung des Haupturlaubs im Jahr 2022 ist, spielt ökologisch nachhaltiges Reisen - siehe z.B. CO2-Fußabdruck - eine untergeordnete Rolle und steht im Ranking der 17 Kriterien bei der Buchung an letzter Stelle. Wie in vielen anderen Studien zeigt sich auch hier, dass das Thema Nachhaltigkeit immer wichtiger wird, aber als Aufgabe des Anbieters gesehen wird. Die Bereitschaft, einen Aufpreis in direktem Zusammenhang mit dem Thema zu zahlen, ist gering (5 -10%).

Vertrieb

Die Buchungen sind zurück, die Stimmung in den Reisebüros ist auf einem Höchststand. Das zeigt der Touristische Vertriebsklima-Index der Unternehmensberatung Dr. Fried & Partner für den Februar. Die aktuelle Lage wird so gut beurteilt, wie noch nie seit Erhebungsbeginn im Jahr 2005. Der diesjährige Januar stellte sogar den Vergleichsmonat 2019 vor Corona in den Schatten, bestätigen aktuelle Marktdaten von Travel Data + Analytics (TDA). Die Bundesbürger haben demnach Urlaubsreisen für mehr als drei Milliarden Euro im Reisebüro oder online auf Reiseportalen gebucht.

Laut der aktuellen Veranstalter-Statistik des Touristik-Fachblatts FVW überschritten im vergangenen Geschäftsjahr sieben Veranstalter die Umsatzmarke von einer Milliarde Euro. Marktführer bleibt mit grossem Abstand TUI (5,8), dahinter liegen DER Touristik (3) und FTI (2,96) nahezu gleichauf. Alltours und Schauinsland liegen mit 1,86 Milliarden Euro Umsatz ebenfalls gleichauf. Die inhabergeführten Unternehmen konnten deutlich höhere Umsätze erzielen als im Jahr 2019 und sind laut FVW die "größten Gewinner aus der Thomas-Cook-Pleite", die sich im September 2019 ereignete. Als Kreuzfahrt-Marktführer erreichte Aida Cruises, 1,37 Milliarden Euro Umsatz, Tui Cruises erzielte 1,24. Zu den Umsatz-Milliardären gesellt sich ausserdem die Schweizer Hotelplan-Gruppe, zu der auch der Aschaffener Veranstalter Vtours gehört. Sie erreichte einen Umsatz von 1,23 Milliarden Euro. Insgesamt blieben aber die Veranstalterumsätze im vergangenen Geschäftsjahr nach Daten von GfK, DRV und FVW noch deutlich unter denen des Jahres 2019.

Wirtschaft und Verbraucher

Der Geschäftsklima-Index des Ifo-Instituts ist im Februar leicht angestiegen. Vor allem die Erwartungen hellten sich auf. Die deutsche Wirtschaft arbeite sich allmählich aus ihrer Schwächephase heraus, meinen die Wirtschaftsforscher. Das gelte insbesondere für das Gastgewerbe und den Tourismus. Der GfK-Konsumklima-Index (Gesellschaft für Konsumforschung) in Deutschland steigt im fünften Monat in Folge an. Der Pessimismus der Verbraucher aus dem Herbst ist überwunden. Sowohl die Konjunktur- als auch die Einkommenserwartung legen im März spürbar zu. Die Anschaffungsneigung setzt laut GfK ihr ständiges Auf und Ab fort und gewinnt aktuell nur leicht hinzu. Doch offenbar sind die Konsumenten, ebenso wie die überwiegende Mehrheit der Experten, der Meinung, dass in diesem Jahr eine Rezession in Deutschland – wenn auch knapp – vermieden werden kann, erläutern die Konjunkturforscher.



Campaigning & Activation

Radio Die Neue 107.7: OnAir Promotion „Zwei Herzen. Ein Skigebiet“ mit Arosa Lenzerheide. Total erreichte Kontakte: 4'181'000

Top Spot Award 2022: Im Dezember 2022 fand der zweite Top Spot Award of Switzerland in Crans-Montana im Wallis statt. 10 Videographen aus Europa haben am Film Wettbewerb teilgenommen. In 100 Stunden wurden 10 mal hundert Sekunden Filme erstellt. Die besten 3 Gewinner wurden gekürt. Aus dem Content wurde eine grosse Digitalkampagne erstellt, die im Januar und Februar auf TikTok, Instagram und Youtube in den Märkten Deutschland, Frankreich, UK und Niederlande lief.

Lernidee Erlebnisreisen Kino-Events: Im Februar konnte Schweiz Tourismus zusammen mit der Swiss Travel System AG die Grand Train Tour of Switzerland präsentieren. In Berlin, Frankfurt, Stuttgart und München waren total 750 geladene Gäste

Deutsche Bahn Frühjahrskampagne: Integration Schweiz in die bundesweite digitale „Sparpreis Europa Kampagne“ vom 31.1. – 15.2.23

KAM

Webinar mit Basel und Newsletter für die Trade Kontakte mit 50 Teilnehmern am Webinaren

Switzerland Travel Mart –Snow Edition in Zermatt: Teilnahme mit 11 Reiseveranstaltern aus Deutschland.

Bewerbung der Schweiz Akademie im Touristik Aktuell Magazin mit 22'400 Kontakte in Reisebüros deutschlandweit.

Willy Scharnow-Stiftung für Tourismus: Vom 26. – 29.01.2023 waren 12 Expedienten auf einer Studienreise im Wallis

KMM

Advertorial DSV Ski&Berge mit 1'320'000 erreichte Kontakte mit Fokus auf Kooperationspartner Valais Wallis.

KMM Newsletter Jan & Feb, 4-5 News pro Newsletter, geht an 1600 Kontakte raus.

Medienreisekatalog Sommer ist online.

Exklusiv-Interview mit Roger Federer und Trevor Noah in Zürich am 11.1. durch RTL.

Future Activities

Wir sind bereit für die ITB 2023! Zusammen mit unseren Messe-Partnern starten wir vom 7. bis 9. März in Berlin – endlich wieder in Präsenz – unser eventgeladenes Swisstainable ITB-Programm. Nach der ITB geht es kampagnenstark in Deutschland weiter: Die zentrale „Roger“-Kampagne sowie



diverse starke Recovery-Massnahmen bilden die Grundlage für die grosse Key-Partner-Marktaktivität zum Sommerthema Grand Train Tour: In die Schweiz geht es und dort fortbewegt wird sich ausschliesslich mit dem ÖV – nachhaltig, komfortabel, mit den fantastischsten Tour-Ausblicken – und Einblicken in die unverwechselbaren Erlebnisse bei unseren Key Partnern.

Dazu haben wir ab Mai einen Marketing-Fokus auf die wichtige Rhein-Main-Region mit ihrem ÖV-Anreisehub Frankfurt am Main: Zusammen mit dem Medienpartner und hessischen Radio-Marktführer FFH gestalten wir in 2 Staffeln jeweils mit wechselnden Key Partnern die Samstagsshow und begeistern über Radio, Web und Social Media für Sommerferien in der Schweiz – und die nachhaltige ÖV-Anreise!

Für April sind Mediendinner in Süd- und Norddeutschland geplant.

100% Women: Die Kampagne wird dieses Jahr mit einem Fokus auf Cycling fortgesetzt. Als Aushängeschild im Markt Deutschland wird sich Beatrice Egli einer „Cycling Challenge“ stellen und zum ersten Mal mit dem Mountainbike einen Flow Trail meistern. Dies wird video- und fotografisch begleitet.

Interesting observations

Nach der Eingliederung des Verlagshauses Gruner + Jahr (G+J) als Tochtergesellschaft in die RTL-Gruppe Köln (beides mehrheitlich Bertelsmann Konzern) im Jahr 2021 wurde eine Überprüfung des Titelportfolios und eine generelle Restrukturierung der Verlagstätigkeit geprüft. Die im Februar 2023 kommunizierte Entscheidung kommt einer Zerschlagung des renommierten Hamburger Verlagshauses gleich. Behalten und eingegliedert werden sollen die Kernmarken wie stern, Capital und GEO. Andere Titel und Beteiligungen sollen verkauft oder eingestellt, Line-Extensions in aller Regel eingestellt werden.



1. Priority Markets

GREATER CHINA

Market Situation

On January 8th Mainland China has seen its grand opening after 3 years of pandemic. The search for overseas destinations has surged and flight capacity is slowly increasing. While interest in Switzerland is enormous and first groups have already ventured out and travelled to our destinations, most consumers chose nearby destinations for their first trip abroad, namely Thailand, Macao or Japan.

As the first batch of outbound countries recommended by the Chinese government, many enterprises will give priority to Switzerland as one of the reference destinations when making the choice of outbound destinations, therefore, many proposals or requests came to us after CNY holiday.

KAM

While the mood is picking up in Hong Kong, Taiwan and Mainland China, the travel trade is struggling with a lack of resources. Many agents and operators have sized down during the pandemic and are now in the process of hiring talent. New hires need to be trained again on the destination Switzerland and some knowledge has gone missing.

In Hong Kong and Taiwan our buyers face the reality of increased prices. While consumers are willing to pay the more expensive price, the lack of capacity (hotels, tour guides, restaurants for groups) are hindering the outflow of travellers.

In Mainland China, Switzerland is in a pole position as the destination has been chosen as one of 20 destinations for group travel - of which only 3 are in Europe.

KMM

- Winter media conference in Beijing, 60 media invited,
- Winter media conference in Guangzhou
- Switzerland Winter Roadshow in Beijing (community event + VIP dinner reception), in Shanghai (trade events + community event), in Guangzhou (media conference + community event)
- interview recovery topics

Future Activities

- C-Trip Collaboration in April and May
- Switzerland Travel Experience in Hong Kong in April
- Summer Campaign Launch in May
- VIP Events in Hong Kong, Shanghai and Beijing end of March together with the Head of East



1. Priority Markets

ITALY

Market Situation

Italy seems to have avoided an economic recession despite being hit by costly energy prices and record high inflation, Economy Minister Giancarlo Giorgetti said, offering a less grim outlook for the right-wing government. Annual growth is now expected at almost 1%, up from the 0.6% target set in November, a Treasury official has previously said. Italy's 2023 budget has earmarked over 21 billion euros (\$22.4 billion) to help firms and households pay electricity and gas bills in the first quarter of this year.

ON ST Italy Dec.:

ST Italy recorded the first positive month after the pandemic in December with +10.1% ON. Whether this is a sign of a strong increase in Italian visitors in 2023, the statistics of the first semester will show. We are very confident in the return of the Italian market in 2023.

Campaigning & Activation

Promosvizzera Campaign.

Period: 7.11 - 31.12.2022

OOH with Michelle Hunziker at Swiss Corner Milano.

OOH campaign with Michelle Hunziker at Gae Aulenti.

Post on @therealhunzigram to launch video «Christmas markets by train».

Branded Content Tgcom24.

Display adv Alfemminile.com.

Advertising on Donna Moderna.

Michelle Hunziker's trip in Basel and Bern.

Event Swiss evening at Swiss School.

Date: 10.1.2023

What: Standing dinner organized by Swiss School and Circolo Svizzero

Participants: 75 guests

Distribution of winter and cities brochures

Partner involved: RhB

Orobie Film Festival Bergamo.

Date: 23-29.1.2023



What: International Mountain Film Festival - 17th edition

Special Guest: Switzerland

Every day broadcast of a 120sec winter video

Friday evening dedicated to Switzerland broadcasting 15min Video of Switzerland

Distribution of Brochure: Corvatsch / St. Moritz / Snow Sport Hotels / AMoS / Winter

Workshop Comitel in Roma.

Date: 25.1.2023

What: Workshop organized by Comitel in cooperation with Il Girasole Viaggi

Focus: Winter offers & Swiss Cities

Participants: 50

eNL II Cioccolatoino.

Date: 6.2.2023

What: eNL sent to out DB Trade

Focus: carnival, San Valentine, offers

Opening rate: 19.8%

Clicked: 1.3%

KAM

STMS 2023 in Zermatt.

Dates: 15-19.1.2023

What: Switzerland Travel Mart focused snow

Where: Zermatt

Contacts invited: Il Girasole Viaggi, Adrastea Viaggi

Workshop TOVE Milano (BIT).

Dates: 12-13.2.2023

What: Travel Open Village fuori BIT c/o Meilà Hotel

In coop with Il Girasole Viaggi

KMM



Individual media trip North.

Period: 9-12.1.2023

Participants: Sara Magro, Giuseppe Fantasia, Laura Itzkowitz

International summit organized by Leading Hotels of the World in Gstaad at Gstaad Palace

ST provided STP

Partner involved: Gstaad

Individual media trip North.

Period: 11-15.1.2023

Participant: Andrea Battaglini

Appenzell and St. Gallen for Lastampa.it

Overnight at Hotel Saentis

Partners involved: Appenzell, St. Gallen City

Group media trip Valais.

Date: 12-15.1.2023

What: Group media trip Valais

Focus: Ski and other winter sports in Loetschental and Zinal

Participants: 4 journalists

Organized by Valais Tourisme

ST provided only train tickets and Point to Point Tickets

Individual media trip North.

Dates: 3-5.2.2023

Participant: Marta Ghelma

Overnight at Hotel Carlton

Partners involved: RhB and St. Moritz for Elle.it

Interview Radio in BLU.

Date: 8.2.2023

What: Piccarda Frulli Radio interview on Radio in Blu (radio network with 200 radios in Italy)

Focus: Carnival, San Valentina, Offers

Individual family trip in Ticino.

Dates: 10-13.2.2023



What: Media trip for Mammedomani on family experiences

Focus: families

Participants: 1 adult and 2 teens

Partner involved: Ticino

Radio interview Radio RAI Mary Pop.

Date: 11.2.2023

What: Piccarda Frulli Radio interview on Radio RAI format Mary Pop

Focus: Carnival

Radio interview Radio RAI Victoria.

Date: 12.2.2023

What: Swiss Ambassador Monika Schmutz interview on Radio RAI format Victoria

Focus: Switzerland

Individual media trip North.

Dates: 23-25.2.2023

Participant: Franca Scotti

Partner involved: Lucerne Tourism

Future Activities

Special promo campaigns in collaboration with Trenitalia to push Eurocity and train travel to Switzerland: Wave 1: "2 for 1" promo, Wave 2: "children for free" promo.
STITA presence at main art fair of Italy in April 2023, MIART 2023



1. Priority Markets

NORTH AMERICA

Market Situation

ST is returning to Los Angeles with a new Media Relations Manager for Western USA. Manuela Hess has joined us from the Swiss Ice Hockey Federation and we are super excited that after 2 1/2 years, we again have a dedicated PR person in California.

Oliver Weibel has completed his transfer from head office to Canada and taken up his position as Director Canada based in Toronto.

The US has ended 2022 7% below the record year of 2019, making it the second best year EVER from the source market USA.

Winter started extremely strong from the US with +19.1% in December compared to record 2019 and plus 2.1% compared to record 2020.

Despite the fragile economic ecosystem we are expecting an great year from the USA.

Canada's recovery has been a bit slower than in the US but we predict that from April to September we will see a real boost in visitors from Canada which will match the record year of 2019.

Best practice competitors

Israel, Escatly Like Nowhere Else <https://www.youtube.com/@goisraelofficial>

The ad is funny and showcases the variety of Israel as well as the amazing vacation experience you can have there. It is distributed widely on all platforms with what must be a generous budget.

Campaigning & Activation

Campaigning & Activation

- AFAR Winter campaign extension, Jan/Feb

KAM

KAM

- STMS Zermatt 2023, January 15 - 19
- Sales Calls (no partner), Toronto, January 18 - 19
- Sales Calls and LHG-Event in Denver, February 2 -3
- Trade webinar with Ticino Tourism, February 16



- Sales Calls Tour East Coast (DC, NYC, Boston) with Jungfrau Railways and Ticino Tourism, February 27 - March 3

SCIB

- PCMA CL Conference, Ohio, Jan 8 - 11
- 'Create with the Swiss' Networking event, Toronto, January 24
- SwissRead #1, January 31
- SITE Global Conference, NYC, 17 -19 February

KMM

KMM

- 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 in Zurich, Bad Ragaz, St Moritz, January 28- February 9
- Media Trip LGBTQ outlets, in Lausanne, Berne, Zurich, Bad Ragaz, Arosa, January 23-30
- Art Field Media Trip in Gstaad, Lausanne, Basel, Zurich, February 3-10
- Winter Influencer trip Rowley Family in Laax, Gstaad, Verbier, February 3-21

Future Activities

KAM

- Trade webinar with Liechtenstein, March 2
- Sales Calls Florida, March 7 - 15
- Trade webinar with Lucerne, March 16
- Event at Stovell House Tampa (Private club), March 8
- Sales Calls and LH/Edelweiss event in Tampa, March 14
- Sales Calls Tour West Coast (LA/SFO/POR/SEA), March 20 - 24
- Sales Calls Canada (Calgary), March 23 - 24
- Mountain Travel Symposium, Banff, March 25 - 31
- Trade webinar with Graubunden, March 30
- Trade webinar with Jungfrau Railways, April 13
- Trade webinar with Basel, April 20

SCIB

- SwissBreak, March 6- 10
- SMU International, NYC, March 13 -15
- Prestige Client Event, NYC, March 21

KMM

- SwissTalk (webinar), Montreux Jazz Festival with Matthieu Jatton (CEO) March 22
- Super Mums (ski influencer) in Andermatt and Lucerne, March 2-20



1. Priority Markets

UK/IRELAND

Market Situation

While the post-Covid recovery of the UK market was significantly slower than in most other major European markets and the U.S., the last few months might have been the turnaround. The data announced for 2022, our ongoing talks with key tour operators here in the UK as well as with SWISS and other industry insiders, support this assumption.

A few facts about the UK source market for Switzerland in 2022:

- Compared to 2019, overnights are still down 16.8% for the full year 2022. When we look at the development throughout the year, the minus shrank from quarter to quarter: Jan-June -22.9%, July-Sep -14.5%, Oct-Dec -3.5%.
- 2022 was the best December since 2014, with a plus of 7.5% compared to 2019.
- Growth in December came both from the cities (Geneva, Basel) and mountain resorts (Grindelwald, Gstaad), from a mix of, leisure, MICE/business travel, and winter sports.
- In the fourth quarter, the strongest increases compared to 2019 were recorded in Basel, Zermatt, Geneva Region, Lucerne and Grindelwald.
- Thanks to the last quarter and especially the strong December, the UK is again the third most important foreign market for Switzerland globally, behind Germany and the U.S.

With political instability, ongoing industrial action and strikes, no economic growth and record inflation, plus a weak Pound Sterling, not a lot of good news came out of the UK recently. Nevertheless, the travel and tourism industry is developing nicely. Also, the economy did better than expected, the inflation has peaked, and the stock exchange is doing marvellously well.

In addition, British travellers generally are spending more on their holidays than before Covid, and they are staying longer.

Looking ahead, with regards to travel from the UK to Switzerland in 2023: our tour operator partners, SWISS and Swiss destinations are telling us that the winter season is going well. And the bookings for summer look very good.

Based on Switzerland Tourism's and outlooks from external sources, 2023 will be a good year, whereas 2024 and 2025 are expected to be spectacular, with a projected 15% growth in both years from the UK.

Campaigning & Activation

Health Travel Promotion UK

- Media: targeted promotion to Telegraph Health Tourism focussed readers
- Bespoke package: print & digital content, branding and sponsorship of annual health re-set event
- sponsorship of NL - 370k subscribers



- 57k unique views (of online content)

- 1m impressions

Red Bull UK

- Continuation of online promotion with Red Bull

- Winter Digital Hub v2 & Social Media

- Partners: Valais and Bernese Oberland

Valais:

Page views: 191,015

Av dwell time on page: 4 mins 12 secs

Clicks:

- Aletsch Arena: 91,433

- Brig-Simplon: 74,843

- Leukerbad: 83,439

- Nendaz-Veysonnaz: 67,187

- Region Dents du Midi: 94,691

- Saas Fee/ Saastal: 97,717

Bernese Oberland:

Total hub page views: 383,444

Partner button clicks:

- TALK: 137'772 / Gstaad: 110'242

- Interlaken/ Jungfrau Region: 171'119

- Ave dwell time on hub page: 3m49s

- Red Bull Instagram amplification

- Impressions: 297'975

- Clicks: 268,496

KAM

- annual publication of 'The Alphorn', travel trade guide for the UK&Ireland, plus distribution to 13'000 operators and agents via Travel Weekly.



KMM

16-20 January: Media group trip to Andermatt and Engelberg with skiing focus

24-27 January: Media group trip to Brig with outdoor, skiing and spa focus

29 Jan - 2 February: Influencer group trip in collaboration with Preferred Hotels & Resorts to Graubuenden and Zurich (hotesl 7132, Waldhaus and Storchen)

31 Jan - 3 February: Media group trip to Villars

3-5 February: Presence (welcome address) at City Ski Championship in Crans-Montana

7-9 February: Media group trip to Adelboden with skiing focus

13 February: Meet the media Ireland in Dublin with 1:1 interactions and networking with Irish media



2. Active Markets

AUSTRALIA

Market Situation

Economy:

Australia's annual inflation rate in January eased, implying the worst of the price increases may be over as the economy absorbs a record run of interest rate hikes. The consumer price index for the month was 7.4%, compared with 8.4% for December alone, the Australian Bureau of Statistics has announced.

Recovery:

Recovery is well under way with 211,649 overnights in 2022. This is 47% less than in 2019, and therefore a far more positive result than we initially estimated.

Particularly the start of the winter season has performed very well with the December figures only 5% below 2019 numbers. The winter season 2022/23 is the first season where Australians travel to Europe again and we are very optimistic that we almost get back to pre-Covid levels for the remainder of the winter season.

Forecast:

When looking at the forecast, we estimate that by Q4 2023, the market has regained 80% of the 2019 numbers. By the end of 2024 we expect the market to be fully recovered.

Challenges remain:

Airfares are still very high and there is not enough air capacity at the moment.

Many agents are struggling with getting enough, qualified staff.

New travel trade landscape with many new agents entering the market.

Campaigning & Activation

2 February: Swiss Business Award Winner Celebration Event. Gala event celebrating the best Swiss businesses in Australia. Joint activity with SwissChamber of Commerce Australia and Consulate General of Switzerland.

KAM

January: Switzerland feature in Virtuoso Magazine

9-13 January: Winter specialists fam trip. Prior to STMS, a group of Australia Ski Specialists were taken on a famtrip to Jungfrau Region.

13-19 January: 7 buyers from Australia attending Snow Travel Market in Zermatt with various pre-convention tours. Buyers attending from Australia include Sno'n'Ski, Skimax, Mogul Ski and



Travelplan Ski.

10-11 February: Travel Associates Showcase in Brisbane

February: Swisstainable Travel Academy competition with MTA home-based travel agents. 37 agents subscribed and completed the e-learning in February. 6 winners will go on a fam trip in March/April 2023 (focus on Swisstainable).

KMM

January/February: KMM Get Lost Digital Amplification Switzerland content

9 February: KMM e-newsletter with focus on Swiss customs & traditions (cities).

23 February: ST (Switzerland Tourism) and ETC (European Travel Commission) as key sponsors at TravMedia Summit in Sydney. Inclusion of presentation on stage, company logos on events collateral and signage, video looped during breaks and in foyer, press release, SoMe, eDM sent to all delegates.

24 February: Switzerland present at IMM Travmedia's International Media Marketplace in Sydney. 25 1on1 meetings with selected travel writers.



2. Active Markets

AUSTRIA/HUNGARY

Market Situation

Immer noch überproportional hohe Inflation (+11%) im Jan./Feb.: Konsumentenvertrauen angeschlagen. Dennoch: zahlreiche Anfragen von Veranstaltern für Gruppen - auch kleine Serien.

Campaigning & Activation

- 13. Januar 2023: Europe Culinaire in Wien mit 120 Kontakte
- 24. Februar 2023: Advertorial zur SOB im HUB Magazin, 10'000 Auflage

KAM

- 08. Januar 2023: KAM Kooperation mit STC & STS - Reisethek mit 60'000 Kontakten
- 16.-19. Januar 2023: 3 Teilnehmer aus Österreich beim STMS
- 23. Januar 2023: Follow up ÖRV-Kongress - e-mailing an 30 KAM-Kontakte
- 23. Januar 2023: ÖBB Traumzüge katalog 70% Schweiz FIT und Gruppenreisen 14'000 Kontakte
- 13. Februar - 30. März 2023: KAM Sales Blitz aktuell 34 fixierte Termine

KMM

Presse e-Newsletter:

Im Januar und Februar 2023 wurden 2 Presse eNewsletter an je 195 österr. JournalistInnen versendet.

Tourismuspresse.at-Aussendungen:

Im Januar und Februar 2023 wurden 2 Tourismuspresse.at-Aussendungen an je ca. 33'500 Kontakte versendet.

Medienreisen:

Im Februar 2023 wurden individuelle Medienreisen für 4 österreichische MedienvertreterInnen organisiert.

Future Activities



- Eurofun Gästezeitschrift
- KAM Kooperation gemeinsam mit STS und STC: Raiffeisen Reisen, Retter Reisen
- Sommer-Pressefrühstück in Wien mit STS, RhB und Zürich Tourismus
- Recoverydigitalkampagne „RF goes GToS“
- Digitalkampagne zur STP-Promotion „Extratage geschenkt“
- Weekend Gewinnspielkampagnen mit Rausch und Basel



2. Active Markets

BRAZIL

Market Situation

MAIN FACTS ABOUT BRAZIL

The year of 2023 started and the international and the domestic scenarios still present uncertainties in relation to the economic growing pace and inflation. In the foreign scene, the United States has once again increased the interest basic rate to 4.50% a year. However, the advancement was smaller in comparison to the previous ones, bringing a more favorable expectation that the constriction by the FED (Federal Reserve) will be less aggressive, even by the inflation's downturn, which in 2022 reached 6.5% at the end of the year.

Across the world, China is showing signs of economic "reheating" and the expectations for the GDP this year has been increasing to around 6%. This was one of the main concerns because the country has a great influence on the global dynamic and on commodities' prices. With the United States and China giving signs that a more negative predicted scenario shouldn't occur, the uncertainties have gradually decreased, but it's still distant from an optimistic picture.

In the national aspect, Brazil has great challenges ahead. Inflation finished 2022 at 5.79%, way below the 10.06% in the previous year. Nevertheless, the perspective is that it will keep at this level – still increased – in 2023. Fuels should be pricier from March on, given the comeback of the federal tax. The unfavorable climatic conditions contribute to the reduction in the offer of a significant number of foods, and consequently, keep pressuring consumers' wallets.

Average prices being above the established cap by the National Monetary Council for another year, keeps the Central Bank's caution on the interest basic rate, SELIC, maintaining it at the current level of 13.75% a year. Last year, the expectation was that the new downfall cycle in the rate would take place up to the end of the first semester. However, given economic and political uncertainties, the tendency is that it will be kept at this level throughout the entire year, hindering an upturn in the economic growth. Even with an increased interest rate and a lower inflation compared to 2021, it hasn't greatly affected the exchange rate. The Brazilian currency is still above 5 reais per dollar. What has contributed to the devaluation of Real is the lack of clarity about the government's expenditure policy. There's an idea of rethinking the expenditure cap but without establishing a fiscal anchor yet, in other words, where will the resources to cover a possible expenditure increase in a new cap come from?

The picture of resilient inflation, elevated interest rate, depreciated exchange currency and the uncertainties in the political field, reduces the expectations for the economy this year. Sectoral data already shows that there's exhaustion in consumer's vitality. The commerce, for example, registered a slight downfall of 0.6% last year, according to IBGE. Nevertheless, it's worth to remark that the performance was asymmetric, with a relatively better result of those sectors of cheaper and essential goods that don't need credit, from those that are directly connected to credit, like household appliances, car sales etc. In other words, commerce suffers directly from the considerably elevated interest rates.

The industry followed the same trend and pointed to a mild shrinking of 0.7%. The increased credit and costs, along with the international transportation input, hinder the scenario of the industrial sector. The services' sector, on the other hand, has grown 8.3%. The highlight is those segments related to tourism. According to mapping by FecomercioSP, the national Tourism revenue was R\$ 208 billion in 2022, a growth of 28%, driven by air transportation (66.2%), followed by accommodation and food (23.3%). And certainly, this will be the segment in the spotlight in 2023, with companies and consumers expanding their travel expenditure.

In relation to job positions, in 2022, among hired and fired individuals, there was a positive balance of



slightly more than 2 million. However, the data in December was negative at 431 thousand, more negative than the -293 thousand of the same period last year. It will be important to follow up the first data of the year to capture indicators from businesspeople in relation to the economy and the sense of investing in new hires. In the short and medium terms, the Brazilian economy should keep growing, but with high interests limiting a stronger, more solid advancement. While there's no clarity regarding fiscal policies, the chances of a reduction in interests and the appreciation of Real are minimized. Therefore, the challenges are complex and need to be remedied in a fast but responsible way, so that Brazil leaves the trap of growth and goes back to having a strong and sustainable expansion in the long term.

CONFIDENCE INDEXES

The Consumer Confidence Index (ICC) registered growth of 2.1% in January and increased 15.7% in the annual counterbalance, taking the indicator to 125.4 points, the highest threshold since February 2020. The milder inflation is the main factor that has contributed to the optimism of the people in São Paulo. Even because it generates economy in the budget, which allows the payment of overdue bills. Gradually, the economic conditions of families are improving and increasing optimism.

The Trade Entrepreneur Confidence Index (ICEC) reached 114 points in January, a downfall of 4.4% in comparison to December and -4.7% in relation to the same period last year. Although consumers are more optimistic, this picture is not necessarily being converted into an increase in sales. Families are prioritizing essential sectors and paying late debts. This way, business owners lie with a certain caution about seeing the pace of sales beyond the expected one for the moment.

TOURISM

Carnival is a turning point for the business calendar in Brazil, but we can say that the year started earlier in 2023, with tourism filling hotels and flights up since January. Companies like CVC Corp and Orinter broke the sales record in January (R\$ 1.3 billion and R\$ 100 million, respectively), and the year is still a promise of being an upturn for trips.

International trips are still below 2019's figures across the world (reaching nearly 70% of the pre-pandemic's level) and it isn't different in Brazil. 2022 had as aggravating factors some months that still had significant waves of the pandemic (especially at the beginning of the year), a high price dollar, inflation, presidential elections, the Soccer World Cup (won by Argentina), and problems getting the American visa (the waiting time for a new visa was 500 days).

Some companies' air networks had already returned to levels close to 2019's earlier, but most of them will reach 100% or grow in relation to the pre-pandemic period only in 2023.

NEW FLIGHTS

In the past weeks we had the announcement of several new international flights, like Latam's and Delta's São Paulo-Los Angeles, Latam's São Paulo-Johannesburg, Azul's Belo Horizonte-Orlando, and Belo Horizonte-Fort Lauderdale; and also, more frequencies by companies like Delta, American, United (that will resume flying to Washington DC in March), Air Europa, Lufthansa, Air France-KLM, among others. In South America, there's great expectation regarding the winter season in Argentina and Chile, which promises to be the best one in the past years.

2022

Last year, the Brazilian air sector registered 98 million sold tickets, still far from the record in 2017 of 119 million tickets, but it's already close to the levels in 2019. Internationally, it was 15.6 million tickets (already included in this total of 98 million). These figures cover only national airlines (Azul, Gol and LATAM). It's estimated that international companies cover 70% of international passengers, which would total well over 35 million sold flight tickets.



NEWS FROM THE BEGINNING OF THE YEAR

- One of the main operators in the country, Orinter was purchased for US\$ 40 million by the North American group Mondee, which the headquarter is in Austin, Texas.
- The Ministry of Tourism and tourism entities in Brazil (like Abav, Braztoa, and Clia) submitted the approval in the provisional measure that reduces the income tax on international remittances, which increases the cost of trips, especially to the United States. The projection is for a president's sanction still in March.
- Embratur, the Brazilian Tourism promotion organ abroad, has a new president, the politician Marcelo Freixo, who gathered a technical staff that includes names like Jaqueline Gil, Bruno Reis, Monica Samia and Mariana Aldrigui. The country resumed promoting the brand Brasil, created in 2003, as a Tourism symbol for foreign visitors.
- Marcelo Freixo stated that he is against demanding visas for American tourists, as the United States is not reciprocal and continues obligating Brazilians to get a visa to enter the country. To Freixo, the exemption to Americans should continue.
- Brazil also has a new minister of Tourism, Daniela Carneiro. The Ministry of Tourism is completing 20 years – it was created during President Lula's first administration, in 2003.

SWITZERLAND

Destination Switzerland has performed well in 2022 with a -11.2% of overnights compared to 2019, the best year on record for Switzerland Tourism since 2004. We started the year with a stunning +28% increase in January compared to Jan 2019, reaffirming the success of our destination for Brazilians in the winter season. Flight bookings on the only direct flight daily on LX are promising for the coming months, full flights.

Campaigning & Activation

Dedicated Newsletter: Verbier - Highlight: Verbier Tourism dedicated newsletter; **02 mailings:** Jan 06th and 19th; **Mailing:** 26.500 mails for travel agents; 160 mails for corporate travel managers; 1.800 WhatsApp messages to TAs; **Opening rate:** 25,6%; **Key partners highlighted in the content:** Verbier STS;

Teresa Perez - Health Magazine distribution: December 2022 – January 2023; 309 Health Magazine distribution in partnership with Teresa Perez Tours to selected list of potential luxury clients; 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.

Blue Papaya Sales Incentive Campaign: December 2022 – January 2023. Dedicated Webinar held 28 & 29 of November 2022; Swiss-inspired prize for participants of the 2-days webinar; Social Media posts; Sales materials available for travel agencies to promote Switzerland to their clients; 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;

January 28th: Robb Report Day. Event at Fazenda Boa Vista (JHSF Group). Robb Report magazine has organized a day full of experiences to the high-end customers/ readers. Audience: AAA, 400 guests. Others sponsors: Belvedere (drink), Bradesco (bank), Be Fly (travel agency), Illy (coffee), Tania Bulhões (decor). ST Presence: Fabien Clerc and Natália Leal. Switzerland Tourism Lounge: Tv



for ST videos; Toten for logo ; Sustainable and artist experience. Hostess to talk about the activity and to include a postcard containing a QR code to MyS.com/pt in the bags.

About the experience: 260 fabric bags that could be personalized with one of the photos available. Photos available: summer, winter and train. The bags also were available in 3 different colors: red, blue and yellow. The photo was printed using the serigraphy technique. People also could do the serigraphy on the bag itself.

February 2023 - LUXURY TRAVEL & EXPERIENCES MAG by PRIMETOURL: Printed and digital magazine; Double page article; 4500 copies; B2C audience: Primetour's VIP clientes database, American Express & VISA Aeternum clients database; B2B audience: 3000 travel agencies, 60 Independent consultants; Distribution channels: Private jet lounges, art galleries & luxury malls, luxury brands & charity events; Content topic: High-end Gastronomy & Wines; Coverage: Lucerne & Lake Lucerne Region, Verbier, Swiss Wine Regions & Lavaux, Swiss Travel System; MOB; Michelin Star restaurants of Switzerland.

KAM

January 11-13, 2023: Verbier Famtrip. ST Brazil took advantage of the participation of key TOs from Brazil at the STMS and organized 2 extra nights in Switzerland before the oficial program started; 3 Brazilian Tour Operators: Teresa Perez Tours, Kangaroo Tours, Snowtime Ski Travel. Swiss Partners support: Verbier Tourism, Hotel de Verbier, Swiss Travel System. ST team in attendance: Mara Pessoa, Trade Manager.

January 11-13, 2023: Pontresina/ St. Moritz Famtrip. ST Brazil took advantage of the participation of key TOs from Brazil at the STMS and organized 2 extra nights in Switzerland before the oficial program started. 3 Brazilian Tour Operators: Blue Papaya, Sete Mares Turismo, Plantel Turismo. Swiss Partners support: Engadin-St Moritz Tourism, Grand Hotel Kronenhof Pontresina, Swiss Travel System.

January 13-15, 2023: STMS Pre-convention tour. 2 Brazilian buyers in Gstaad: Teresa Perez Tours, Kangaroo Tours; 1 Brazilian buyer in Crans Montana: Snowtime; 3 Brazilian buyers in St Moritz: Blue Papaya, Plantel Turismo, Sete Mares Turismo.

January 15-19, 2023: Swiss Travel Mart Snow Edition (STMS)- Zermatt. ST Brazil were able to invite 6 Key accounts from Brazil to attend the Switzerland Travel Mart - Snow Edition (STMS). The Brazilian delegation speed-dated with around 100 Swiss suppliers. Buyers: Blue Papaya, Teresa Perez Tours, Sete Mares Turismo, Plantel Turismo, Kangaroo Tours, Snowtime. ST Team attendance: Mara Pessoa, Trade Manager Brazil.

January 16-23, 2023: Teresa Perez Winter Famtour. Partnership with Teresa Perez Tours, the main luxury TO from Brazil, for an exclusive winter & ski famtrip with their top travel agentes. 2 Teresa Perez Tours team memmbers + 6 top agentes. Program focus on luxury, ski, spa, gastronomy. Swiss partners support: Crans Montana Tourism; Guarda Golf; Gstaad Tourism; Ultima Collection; Geneva Tourism; Four Seasons; Swiss, Swiss Travel System; ST Team attendance: Fabien Clerc, Market Director Brazil.

January, 2023: KAM Individual Famtrip support. During the month of January, ST Team supported 5 travel agentes/tour operators to visit Switzerland:

- **Art of Travel: Julia Duvivier, owner/ travel designer.** Swiss partners support: Grand Hotel Zermatterhof, Swiss Travel System.

- **Insider Tips (Embark Beyond Brazil): Ana Luiza Abraão, owner/ travel designer.** Swiss partners support: Swiss Travel System, Mandarin Oriental Luzern;



- **Meg Raimondo Ski & Luxury Travel (TTW Lab): Margareth Raimondo, owner/ ski travel specialist; Swiss partners support:** Zermatt Tourism, Mont Cervin, Cervo Mountain Resort; Verbier Tourism, Le Cordee des Alpes, Swiss Travel System.

- **Sete Mares Turismo: Guilherme Burti Jardim, owner.** Swiss partners support: Swiss Travel System.

- **TTW Group / Ski Brazil: Eduardo Gaz, CEO.** Swiss partners support: Swiss Travel System;

February 17, 2023 - Sete Mares Turismo Training: Dedicated face-to-face training presentation to Sete Mares Turismo & Sete Mares Ski teams; 10 travel professional from leisure products & operations and leisure sales teams in attendance; Topics: Summer & Swiss Travel System; ST Brazil team: Mara Pessoa.

February 28, 2023 - Online Training Wee Travel: Dedicated online training presentation to Wee Travel team; Topics: Summer, Cities & Wine tourism; Dedicated Q&A session; ST Brazil team: Mara Pessoa and Natalia Leal.

KMM

January, 1st 2023: Media Trip @avioesemusica. Aviões e Músicas by Lito Sousa – 711K followers. Trip to promote Swiss Travel System. ST Support: STP. Segment: Snow Lover.

January, 4th to 14th 2023: Media Trip @silviabraz. Silvia Braz – 1.3MIO followers. Trip to promote Lucerne – Mandarin Oriental, Gstaad – Alpina Gstaad and Crans-Montana – Guarda Golf Hotel. ST Support: flight, transfer, overnights and program. Segment: Luxury.

January, 4th to 14th 2023: Media Trip @mariabraz. Maria Braz – 360K followers. Trip to promote Lucerne – Mandarin Oriental, Gstaad – Alpina Gstaad and Crans-Montana – Guarda Golf Hotel. ST Support: Overnights, transfer and program. Segment: Luxury.

January, 9th to 13th 2023: Media Trip @brunoastuto. Bruno Astuto– 941K followers. Trip to promote Crans-Montana/ Guarda Golf Hotel. ST Support: transfer and overnight. Segment: Luxury.

January, 16th to 18th 2023: Media Trip @loucosporviagem. Fabiane Gama – 578K followers. Trip to promote Zermatt – Cervo Hotel. ST Support: STP and 2 overnights. Segment: Snow lover.

January, 28th 2023: Media Trip @clarissawagner. Clarissa Wagner– 67K followers; Trip to promote Swiss Travel System. ST Support: STP. Segment: Luxury.

January, 29th 2023: Media Trip @elisazarzur. Elisa Zarzur – 215K followers

Trip to promote St. Moritz, Snow Polo Event. ST Support: 2 tickets to the Snow Polo Event.

January, 30th 2023: Aletania – 283K followers . Trip to promote Glacier Express – Excellence Class. ST Support: Ticket to Excellence Class Experience. Segment: Luxury.

January: Media trip return - Top Magazine article. Printed version and social media channel. 40'000 copies. Audience: A, AAA. Coverage: Geneva, Luzern region. ST Support: Flight, 4 overnights and experieciens. 14 pages about Switzerland.

February: Media Trip **between, February 24th to March, 7th.** Adriane Galisteu – 5MIO followers. Trip to promote cities and mountain during the winter season. Segment: Snow Lover and City Break. ST Support: flights, STP, overnights and program in Geneva, Interlaken and Zurich for the family (3 pax),



February: Verbier is considered the best ski resort for skiing.

Band News online. More than 20K page views

Verbier is considered the best ski resort for skiing. Portal IN

More than 45K page views

Future Activities

March 09-16, 2023: Blue Papaya Famtour | Crans-Montana, Zermatt, St Moritz.

March 13-17, 2023: STE Brazil 2023 | São Paulo, Brasília, Curitiba.

March 28 & 30, 2023: ST , STS & TT Operadora B2B events | Porto Alegre, Rio de Janeiro.

March 18-26, 2023: St. Moritz & Interlaken Ski Famtrip.

March: Media Trip Giovanna Lancellotti

March: Media Trip Se liga no Roteiro

April: Media Trip Dabiela Cicarelli

April: Digital campaign STP



2. Active Markets

CZECH REPUBLIC

Market Situation

Tourism update:

- There are currently 573 active tour operators with valid mandatory insurance against bankruptcy.
- 190 tour operators and 67 travel agencies with Switzerland offer.

Decreased overall amount of TO's, but increased amount of TO's with Switzerland products.

- Big Czech tour operators are selling its Switzerland products and trips for 2023 with high interest by Czechs – there is expectation of low availability of last-minute offers during Summer 2023.
- Despite of current challenges (high year-to-year inflation rate, Russian war, energy price etc.), Czechs are travelling without any major restrictions.
- ON statistics January 2023 / January 2019: +8,0%. We expect increased interested in Switzerland by Czech tour operators and travel agencies.
- Eurowings will launch its connection from Prague to Geneva in summer flight timetable
- Up to 72% Czech are looking for supplementary accommodation with average length of stay of 6,5 night and spending of 1.129 CHF per booking. Segment of Luxury travellers is growing, and premium tour operators are trying to add Switzerland as a new product.

Economics:

- GDP of 4Q/2022 +0,2%
- Consumer price index in February 2023 +16,7%
- Inflation rate in February 2023 +16,2%
- Industrial production in January 2023 -1,4%
- Construction production in January 2023 +5,4%
- International trade – import: +11,8% in January 2023
- International trade – export: +12,1 % in January 2023
- Average gross wages and salaries +7,9% in 4Q/2022
- General unemployment rate in January 2023 was 2,6%
- Exchange rate 1,- CHF = 24,314 CZK

Politics situation:

- Czech President vote won Petr Pavel
- Czech government faced decree popularity due decreasing of pensions for seniors and the political situation in general is stable



Campaigning & Activation

- 5. 1. - Digital advertorial presenting Bernina Express and Glacier Express (incl. Excellence class) for winter train trips placed at Forbes.cz (website of the magazine Forbes in Czech language). Additional promo of the article via IG page Forbes, Forbes newsletters "Cocktail" and newsletter "Espresso".
- 5. 1. - Advertorial promoting winter possibilities of Engadin (ski- cross-country ski, snowshoe hiking, spa), Lucerne with Rigi and RhB Winter Bernina Panorama offer, Davos Klosters with guest program, Jungfraubahnen with Snowpennair and skipas program, Aletsch Arena & Zermatt Bergbahnen with ski possibilities - placed at one of biggest newspaper website portal Denik.cz.
- 6. 1. - Advertorial presenting TOP 5 winter activities placed at travel website TravelFever.cz with promotion of Davos Klosters (ski, guest program), Schilthorn (ski, Pitz Gloria), Engadin (cross-country ski in Val Müstair), Aletsch Arena (ski and snowshoe hiking), GTToS (GEX, BEX, Rigi, SGV).
- 10. 1. - On-line advertorial presenting TOP 10 Winter activities and experiences placed at website portal PremiumSports.cz (focused on active vacation and premium experiences) with promotion of: GTToS incl. RHB, wellness at Rigi, Davos Klosters Premium Card, Spengler Cup, Pistenbully experience by Zermatt Bergbahnen, Early bird offer by Aletsch Arena, cross-country skiing in Val Mustair, Via Silenzi snowshoe hiking trail in Engadin Scuol, fondue ride by Rigi Bahnen, brunch on Lake Lucerne, Snowpennair by JFB.
- 25. 1. - On-line banner placed in regular e-newsletter by magazine Estate (luxury magazine focused on exclusive activities, experiences and products, and social topics) with focus on Swisustainable activities linked to MojeSvycarsko.com
- 1. 2. - Two months Swisustainable banner campaign at travel website TTG.cz focused on experts in tourism and general public with link to MySwitzerland.com/Swisustainable
- 8. 2. – Travel presentation "Switzerland with camper" by Club of Swiss friends in Prague with promotion of GToS.
- 8. 2. - Digital advertorial presenting Engadin Scuol (snowshoes) and Samnaun (with ski and luxury accommodation) and Davos Klosters (fatbike, igloo) and CD Ski with promo of Swisustainable traveling to Switzerland by train placed at Forbes.cz (website of the magazine Forbes in Czech language). Additional promo of the article via IG page Forbes, Forbes newsletters "Cocktail" and newsletter "Espresso".

KAM

- 11. 1. - Indiv. FAM trip CEDOK – 1 person (11. - 14.1.2023)
- 15. – 19.1. – CZ and SK delegation at STMS in Zermatt with 7 TO's representatives
- January - signed Business plan with promo activities (GTToS and Swisustainable) for one year with TO CEDOK
- January – agreed Business plan with promo activities for one year with Czech national railway carrier Czech Railways



KMM

- January – 4/1 winter advertorial placed in magazine SNOW with promotion of ski touring from Davos to Arosa
- January – photo contest in magazine SNOW combined with e-contest at snow.cz with focus on Engadin Samnaun
- 15. 1. - 4/1 advertorial placed in deluxe winter magazine Premium Ski 1/2023 with promotion of winter events in Switzerland (Lilu Licht Festival in Lucerne, St. Moritz Gourmet Festival, White Turf, Fasnacht in Basel and Lucerne, Tschaggatta in Loetschental, Snowpenair at Mannlichen, Zermatt Unplugged and Fruhling Schneefest Samnaun).
- 30. 1. - Media Trip of Mr. Harak with focus on funiculars in Switzerland
- February – 4/1 winter advertorial placed in magazine SNOW with promotion of ski touring (Davos Klosters, Lower Engadin and Upper Engadin)
- February – photo contest in magazine SNOW combined with e-contest at snow.cz with focus on Aletsch Arena
- 7. 2. - Engadin media trip with focus on ski, culture and gourmet – 1 PAX (7. - 11.2.2023)
- 26. 2. - Winter family trip to Engadin Scuol Samnaun for magazine Travel Life – 4 PAX (26.2. - 2.3.2023)

Future Activities

- ST Newsletters (B2C & B2B)
- individual media and influencer trips
- SWISSmag summer edition, 10. 3. 2023
- Sales calls RhB, 6. - 16. 3. 2023
- ST workshop, 14. 3. 2023
- ST Press conference SUMMER 2023, 16. 3. 2023
- ST at Holiday World (part of year campaign TTG), 17. - 18. 3. 2023
- KAM newsletter next week
- For Bikes 2023, 24. - 26. 3. 2023
- RhB advertorial in Leo Express SPRING 2023



2. Active Markets

INDIA

Market Situation

Before the overall report for last year, the figures for December. The positive trend and signs of recovery were measurable gradually month by month, but the month of December was really interesting. The drop in arrivals, compared to 2019, was **-9.1%**, while for overnight stays, the drop was a small **-1.8%**.

In absolute values:

Arrivals in December: 10'394 (11'433 in 2019)

Overnights in December: 25'975 (26'466 in 2019)

Annual overview:

The various restrictions in place for entry into Switzerland, valid until just before the imminent start of the high holiday season for Indian customers (Covid certificate required for third countries, coupled with other negative dynamics, again on the subject of covid, the late implementation of the booster in India, the limited availability of air connections then and finally the not entirely predictable visa issue), meant that the market did not perform as well as we would have liked. More specifically, we recorded the following figures:

Arrivals January – December: 157'445 (355'992 in 2019), equal to **-55.8%**

Overnights January – December: 380'135 (792'607 in 2019), equal to **-52.0%**

For the record, the 2022 figures compared to 2021: an increase in arrivals of **+482.2%**, of overnight stays **+399.9%**

Various factors have already shown a true recovery of which we are seeing tangible signs. This is demonstrated by overnight stays, but also by other elements:

- Extension of the classical holiday season (holidays for those who, for example, did not receive a visa in time, were not cancelled, but postponed to the autumn and winter months. This has also been confirmed by the increase in requests that came to us from Tour Operators on purely autumnal or winter destinations and products (Christmas markets, skiing or winter sports in general, alternative activities to be carried out in these seasons).

- STS sales also help us to understand market performance. In 2022, STS reached 70% of their 2019 business. December 2022 compared to December 2019 points to +81%. January 2023 compared to January 2019 is over 100% growth.

- Visa Situation: after a few critical months in mid-2022, the situation has definitely improved month by month. Our visa section at the Embassy in Delhi has been working hard in view of the upcoming peak season and will work with the maximum capacity of 50 people, as in 2019. For visas, the hot months are normally April and May. To indicate to you the turmoil in the market, in November 2022 about 2'500 more visas were given than in the same month of 2019 (as for overnight stays, I take the pre-covid year as a reference), in December 2'300 more, in January this year about 2'800 more than in 2019. Starting on 1 March, the currently available slots will be doubled, and so on until we want to reach at least 2019 levels for the main months. On the 'Swiss' side, everything has been done for an optimal handling of applications. What is out of our control is how other countries' embassies will handle the situation. A slowdown or total blockade on their part could mean quantities of requests beyond the norm and feasibility coming to our section (with the various consequences of applications



from travelers not interested in Switzerland, visa shopping situations, poor quality of documents, high rate of rejections, etc.).

- Air connections: SWISS has been 100% operational again for a year now, both from Mumbai and Delhi, but non-direct connections from other Indian and Gulf airlines are increasing. This makes the market more dynamic in terms of pricing and obviously increases the options for reaching our country.

- MICE: which was expected to recover more slowly than the leisure sector, is showing great satisfaction. Numerous groups already visited our country last year, but many have been confirmed for this first half-year. Others will be confirmed shortly for the second half of the year. Among them are some top-level groups with a truly exclusive program in Switzerland.

In view of “Swisstainability” and ST's strategic objectives, we are working with some tour operators to promote packages with additional nights in Switzerland. Tour operators, in turn, are busy promoting packages in view of the upcoming season, confirming requests equal to the pre-pandemic period.

All these factors give us great optimism. Let's not forget that competition is strong, we are in a very aggressive market. India is a market with a very young population, an ever-growing upper class and a desire to travel in a new way. All-round b2c promotion, but also a constant and increasingly necessary relationship with the industry, are key to staying top of mind, making new experiences and destinations accessible to not only numerous but also quality customers.

Campaigning & Activation

KAM:

- Promoted 16th Feb 2023 Swiss Schengen Visa Webinar on prominent trade publication - TravTalk. Total No. of contacts = 108'600.

PROMOTION:

1. City & Airport OOH Advertisement for Neeraj Chopra Campaign

- A total of 20 billboards & digital screens in Mumbai & 44 digital screens & billboards in Delhi for a period of 15 days & 1 month for selective locations was executed within:

Mumbai SOBO, Western suburb & Delhi NCR Prime city locations and shopping malls

- The campaign included digital screens and LED screens at Mumbai, Delhi & Bengaluru Domestic Airport.

- Locations chosen with target audience in mind and each site generating a min of 100'000 views per day.

- **The campaign is ongoing and numbers to be shared by next month**

2. Neeraj Chopra Newspaper Advertisements

- Half page advertisement along with half page edit content placement was executed in publications namely – Times of India, Hindustan Times & Mint

- All three newspapers are the highest circulated papers in India giving us a huge reach.

- Total Circulation: **3'642'000**

- Total contacts: **10'926'000**



3. Double Spread & single Page Print Advertisement in magazines

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

- a. Travel + Leisure
- b. Conde Nast
- c. India Today Spice
- d. Vogue

- Total Circulation: **567'700**

- Total Contacts: **2'838'500**

5. Display & Social Campaign Neeraj Chopra

The digital display campaigns for Neeraj Chopra Summer Campaign has been executed on mediums like news app, entertainment apps, OTT apps etc.

The platforms included in the campaign are namely:

- a. Taboola
- b. Inshorts
- c. WeTransfer
- d. Hotstar (Indian OTT)
- e. YouTube
- f. Facebook

- **The campaign is ongoing and numbers to be shared by next month**

KAM

KAM:

- 13th - 20th Jan 2023: 5 Indian TAs / TOs (TBO.com, Travel Engineers, Pangea Travel, Encompass Experiences and All Four Season Holidays) participated at Switzerland Travel Mart - Snow Edition (STM) 2023, where they got the opportunity to meet and interact with over 100 winter Swiss buyers over networking sessions and a social program. They also got the opportunity to experience Switzerland's winter offerings.

- 16th Feb 2023: Exclusive 45 min webinar with the Embassy of Switzerland Visa Section highlighting the latest information / updates about the Swiss Schengen visa and its application process. The webinar includes live polls, live Q&A session and a quiz at the end. Total No. of attendees = 868.

- 20th - 23rd Feb 2023: Sales Calls with TAs / TOs / Wholesalers / Consolidators / Incoming Operators in Delhi. Focus on GIT / FIT / Luxury Travels. 14 companies met (Kuoni Tumlare, Duurbeen Bespoke, Star Vacations, Eurocursions, Travel Engineers, Dpauls, Itinerary Planners, Maurya Travels, Thomas Cook Delhi, BookItFree.com, HolidayTribe, PickYourTrail, Away&Co and Worldwide DMC).



KMM

1. Trade news release to promote Outdoor activities.

Our trade release talking about Switzerland Tourism Promoting its Great Outdoors with Sports Icon Neeraj Chopra got many pickups in trade media.

Total: **5 Clips**

Total Contacts: **17'0451**

2. Top media Query in Jan - Moneycontrol

Total: **1**

Total Contacts: **6'024'330**

3. Top media Query in Feb – Vistara, Hotelier India, Economic Times, Architectural Digest

Total: **5**

Total Contacts: **234'255**

Future Activities

KAM:

- 20th - 27th Mar 2023: India Workshop in Switzerland where 32 buyers from India will get the opportunity to interact / network with over 50 Swiss Suppliers, as well as experience Switzerland and its various touristic offerings over post-tours
- 13th - 16th Mar 2023: Trainings with Wholesaler Otila International Pvt. Ltd. in Indore and Nagpur along with Independent sales calls in those markets
- 18th April 2023: Webinar on Swiss Travel System
- Mar - Apr - May: JMA with Thomas Cook India focusing on the STS promo

Campaigning & Activation:

- Continuation of Neeraj Chopra Campaign
- Roger Federer GTToS campaign
- STS Promotion

KMM:

- Media trip with LX with focus Sustainable tourism in Mar
- Influencers trip



2. Active Markets

JAPAN

Market Situation

International travel has resumed and Switzerland has been the best selling destination within Europe. However, the recovery is progressing slowly due to Covid measures still being active in Japan, a poor exchange rate (the Swiss Frank is 23% higher than in 2029) and a lack of airline seats availability. Mid March, the mask regulations will be loosened and in May, Covid will be re-classified as a flu.

Japanese Travel Agents are struggling to find hotels in Switzerland during the summer high season.

Campaigning & Activation

1 February: Presentation of the Swiss Pavillion at the EXPO Osaka in 2025 at the residence of the Ambassador.

KAM

- 20 January: Webinar for 200 travel Agents who are member of the Japan Association of Travel Agents. 30min presentation of all news in Switzerland.
- 24/25 February: Consumer events with travel Agent Fellow Travel.
- January: Campaign with travel agent Oshshu for Swiss Travel System. Application phase for a monitor tour project in summer.
- 17 February: HIS newspaper ad with Swiss mono product.

KMM

Media Result

Magazine:

- 'Kateigaho' high-end women's magazine to feature Grand Train Tour of Switzerland from St. Gallen, Interlaken and Montreux with 3 world heritage sites for a special cover story of 18 pages.
- 'Bi-Premium' luxury women's magazine introduced Zermatt/Matterhorn and Jungfrauoch as the desired travel destinations.
- 'Hare Yoho' membership magazine of VISA card to feature RhB world record event and 5 Swiss panoramic trains such as GEX, BEX, GPX, VAE and Alpine Classic Pullman Express as the result of Int'l media trip 'World Records'.

TV:

- TV Tokyo 'Great Masters of Art' features Hakone Tozan Railway with its sister relationship of RhB.



Online:

- 'BE-PAL' outdoor magazine introduced about winter train journey on Glacier Express, as the result of Int'l media trip 'Winer Magic'.

Guidebook:

- 'Globetrotter' travel guidebook special edition to introduce world noodles including Switzerland.

Future Activities

- 17 March: media summer launch in Tokyo.



2. Active Markets

KOREA

Market Situation

[Economy]

International credit rating agency Fitch maintained Korea's national credit rating at 'AA-' and the rating outlook at 'stable'. The forecast for Korea's economic growth in 2023 was presented at 1.2%, the same as before.

[Tourism]

In January 2023, the number of Korean outbound guests rose to 61.2% of the pre-Corona 19 level. Expectations are high that the recovery trend that started in earnest from the end of last year will continue and accelerate the normalization of the travel market.

Campaigning & Activation

Interactive Content Hub Website Development

* Target launch date: end of April

* Purpose of the project:

- Create an interactive archive content hub that has all the useful information for any users with an interest in Switzerland, the celebrities & influencers they follow.

- Make much easier for users to view all the useful/practical content created from all campaigns

KAM

Entrance Exam for 2023 STA

- Venue: Swiss Embassy in Seoul

- Date: Feb. 27th, 2023

- Applicants: 30 pax from major KAs

1st Seminar of STA

- Date: Mar. 7th, 2023

- Venue: Swiss Embassy in Seoul

- Participants: 17 pax incl. HanaTour, ModeTour, Hyecho, NaeilTour, etc.



- Program;

Introductions of STSEL partners by JK

RhB product introduction and itinerary suggestion by Sebastian Blättler and Janice Jo

ZRH-ICN Direct Flight Promotion with Korean Air.

- Title: Let's Go! Swisstainable Way

- Background ; Suspension of direct flight operation from Zurich to Seoul during Covid. As of 28 Mar., resumption of direct flights, 3 times per week

- Promotion overview

- Period: Mar. 6th – Apr. 16th

- Contents:

5% flight ticket discount with promotion code 'Swisstainable'

Coffee e-coupon with quiz for 'Swisstainable'

- Channels: KE website & Insta, FB, Twitter

KMM

Media Newsletters to 650 journalists in Jan & Feb respectively

* Major results:

-Sustainable eco-friendly accommodations (8 Jan)

-Eco Art hotel in Graubünden (5 Feb)

-All about Winter in Zurich (13 Feb)

Future Activities

Celebrating the 60th anniversary of Swiss-Korean diplomatic relations

- Title: Swiss Spring Street Festival

- Period: Apr. 8th - May 8th, 2023

- Venue: Gyeongui Line Book Street

- Exhibiting representative tourist destinations which are popular among Koreans
2023 STE Korea

- Period: Apr. 18 -20

- Venue: The Shilla

- Program:

18th Apr. Dinner with STA 17th members

19th Apr. Open workshop, 1:1 meeting, dinner reception

20th Apr. Networking with major KAs



2. Active Markets

NORDICS

Market Situation

In the Nordic countries housing markets face a sharp slowdown on the background of sharply increasing interest rates. This comes however after seeing exorbitant price increases during the pandemic and can as such be perceived as a correction from unsustainable high price levels. Also, weaker purchasing power will dampen economic activity throughout the year. However, as labour markets are still strong and inflation is like to decline substantially over 2023 the economies are expected to recover by the end of the year, while the upswing in 2024 most likely will be modest.

Campaigning & Activation

- Meta ad campaign - joint campaign with SWISS Airline and Valais region pushing the new seasonal direct flight to Geneva, targeting Sthlm, Cph and Goth.

Campaign period: Jan 15th- March 15th

- NO: Aftenposten/VG, Digital Native

Partner activity: Valais

Campaign period: Jan 19-22

-Meta ad partner campaign 2nd wave, Traffic

Mürren, Schilthorn, Zermatt, Engadin

Campaign Period: Jan 15- March 15th

-FI: Hufvudstadsbaldet, Digital Native

Partner activity: Valais

KAM

TRADE

Fam Trips / Site Inspections

FI - Fam Trip, Elämysmatkat, 1 pax - Jungfrau Region, 4-8/1

FI - Fam Trip, Select Collection. 1 pax – Geneva, 6-8/1

SE - Fam Trip, 11-21/1, Travel Beyond, 1 pax

- Engelberg / Kempinski - 11-14/1

- Lucerne / Mandarin Hotel - 14-15/1



- Andermatt / The Chedi - 15-17/1
- Zürich / Schaffhausen - 17-21/1
- SE - Fam Trip, Konfido, 1 pax, Saas-Fee, 13-15/1
- SE - Post Conv - BIG Travel Concept, Zermatt. (STM), 19-20/1
- SE - Fam Trip, GoWest, 1 pax, Champéry, 19-21/1
- NO - Fam Trip, Alpene. 1 pax, Crans-Montana, 19-22/1
- NO - Fam Trip, Alpesspecialisten, 1 pax, Verbier, 19-22/1
- SE - Fam Trip, Alpine Legends, 1 pax, Glacier Express + St Moritz, 19-22/1
- SE - Fam Trip, Konfido, 1 pax, Disentis / Andermatt, 20-23/1
- SE - Fam Trip, BIG Travel Concept, 1 pax, Davos. 20-22/1
- NO - Site Inspection, Alpesspecialisten + Noreco, 2 pax, Andermatt 22-24/1
- NO - Site Inspection, Alpesspecialisten, 1 pax, Davos 24-26/01

KMM

Press trips:

- SE - Brand: Stellar Equipment 5-9 Jan Engelberg
- DK - Journalist: Aller Media/Politiken/ Liebhaverboligen 9-12 Jan, Lenzerheide
- NO - Influencer: Nikolai Schirmer, Krister Kopala, Ebba Forsgren 16-25 Jan, Andermatt
- SE - Influencer: Agnes Maltesdotter, 24-26 Jan, Engadin
- DK - Peter Christiansen, 24-29 Jan, Davos
- SE - Influencer: Linn Eklund, 25-26 Jan, Engelberg
- SE - Photograpger: Jens Assur 31-3 Feb, Zermatt
- SE - Influencer/journalist: Lottie Knutson, 3-7 Feb, Engelberg
- DK - Journalist: Per Henrik Brask, 19-23 Feb, Davos Klosters
- SE - Influencer: Mattias Hargin 20-27 Feb, Zermatt, Verbier
- SE - Influencer: Emil Stegfeldt, 27-1 Mars, St.Mortitz



2. Active Markets

POLAND

Market Situation

Politics

- US President Joe Biden visited Poland after his surprise trip to Ukraine and, in a big speech in Warsaw, underlined Poland's important role in the fight for Ukraine, for the protection of democracy and human rights and the security of Europe.
- Poland is still waiting for at least 24 billion Euros in Coronavirus recovery funds from the European Union. The EU Commission has frozen the money to force the right wing Polish government to take back their Justice reform that is seen as unconstitutional. The Polish Parliament has greenlighted a new law that aims to right the situation, but Polish President Andrzej Duda had doubts about the new law's constitutionality and sent it to the Constitution Tribunal, which is in turn controlled by the government.

Economy

- Despite hopes for a positive trajectory, Polish inflation in January 2023 has ticked up again and stood at 17,2% year on year, and at +2,4% compared to December 2022. Analysts are now expecting the rate for February to rise even higher – but think this might be the zenith of the price hikes and could go down steadily from there.
- In January, the minimum wage in Poland rose by over 15% to 3490 Polish Zloty (ca. 750 CHF), with another hike expected for July of this year. Average wages rose in January by 13,5% year on year and now stand at around 6900 Polish Zloty (just under 1500 CHF) – not quite making up for the inflation rate.

Statistics

- For the year 2022, Poland was again leading all other foreign ST markets in hotel overnights expansion. Compared to the last pre-Covid year 2019, Polish travellers registered 3,2% more stays in Swiss hotels, according to the Swiss Bundesamt für Statistik.

Best practice competitors

Sustainable travel in promotion activities for Germany and Austria

Campaigning & Activation

- Online Campaign with eSky.pl - portal for travellers with inspiration, accommodation and ticket sales, display and content for SoMe activities, banners on various websites.

Newsletters 320'000 sent; webpush reach: 620'000 recipients, opened 75'000 times



Bloggers trip to Switzerland (*Olivka blog*)

Banner Impressions: 720'000

SoMe eSky.pl (FB, Instagram) reach: 375'000

SoMe with @mamasaidbecool reach: 99'383

SoMe with @olivka_blog reach: 695'000

Total flight bookings: 959, Total holiday packages (flight & hotel): 48

ST NLs

January: winter activities, carnival in Switzerland, Slopes close to the cities. Skiing in Saas Fee, Winter trips, winter stories - snowshoe, swistainable, brochures.

February: hotels for couples, romantiv hikes, romantic views, wedding in Switzerland, Adelboden love hike, igloo overnight, brochures.

Januarty/February KMM and B2B Newsletters,

KAM

- STMS in Zermatt, Snow Edition, 13 – 19.01. 7 Polish KAMs. Focus on winter offers, with pre-convention trips
- Trade lunch at Swiss embassy, 16th February, Fat Thursday

6 participants: CEOs and Product Managers representing Group, FIT and MICE and SWISS country manager

Discussion & exchange with focus on challenges, chances and future plans

- Business plans with KAM: *Allegra, Snow Show, Hey Holiday, Nekera, Taksidi, Wild Holidays*. Online activities promoting offers. SEM, Social Media and newsletters. Promotion of winter season, main focus on kids' winter holidays. Figures to follow end of season

KMM

- Influencer trip by @Olivka_Blog to Engelberg, Pilatus and Lucerne
16 – 21.01, 116'000 followers, with focus on family skiing trip and other winter activities, cooperation with portal *eSky.pl*, Instagram posts and stories by blogger, reach: 570'000
- Winter media group trip to Jungfrau Ski Region, based in Interlaken
19 – 22.01, with additional indiv. trips to Saas-Fee and Lucerne, 6 participants (journalists, freelance), articles planned after return, Social Media activities during the trip. FB post during the trip reach: 37'000
- Influencer trip by @xtrainer to Saas-Fee and Engelberg, 24-30.01
with focus on outdoor skiing, skitouring, Instagram posts, reels and stories incl. SWISS,



accommodation in hostel and local attractions in both destinations.

Reach: 275'000

- Media meeting in Warsaw, 16th February, Fat Thursday – sweet celebration day in Poland with doughnuts (Berliner), 32 participants: media and influencers

Sum up of 2022 and plans for 2023. Presentation of main summer ST topics by Simon, online recording. Market partners presentation

Future Activities

Summer launch, 15.03., Warsaw
Workshop KAM, 15.03., Warsaw
Media and trade meeting, 16.03., Cracow
Digital ST campaign, April & May
ST map, April
Supplement in *Gazeta Wyborcza*
100% Switzerland w *NGTraveler*, April
Online campaign with RF on GToS (recovery), April - May
Travelling supplement in *Newsweek*
Swisstainable service at *onet.pl* (recovery)
SoMe/digital campaign for market partners
Relaunch of our eGuide GToS
Relaunch of our eGuide GToS
Media trips for *onet.pl*, *Gazeta Wyborcza*



2. Active Markets

SOUTH EAST ASIA

Market Situation

In 2022, Southeast Asia recovered 96.4% of the overnights to Switzerland, with a very strong growth in the second half of 2022 (+26% compared to 2019).

Singapore is the strongest market in the region having generated 1/3 of the overnights and achieving a yearly growth of +27% compared to 2019.

2023 is the year of full recovery, although we expect the growth trend to slow down as the competition of popular destinations such as Japan, Korea, Taiwan is back, and increasing costs due to limited capacity in the industry.

However, we still expect to end up with a moderate growth compared to pre-covid level.

Current reservations for Thailand's Songkran holidays and Indonesia's Lebaran are optimistic, although the visa situation remains tense.

Best practice competitors

STS: JP KR TW have intensified their destination awareness campaign since Dec 2022, pushing sales of JR Pass, KoRail Pass, HSR Pass. OTA partners Klook and KKDay are primary communication and distribution channels.

STS: JNTO launched Konnichi WOW campaign with Klook in Jan-Feb, push awareness and sales for the JR Pass and other tourism products. <https://www.klook.com/en-SG/blog/jr-pass/>

STS: TW Tourism promotes Buy1Get1 FREE High Speed Rail tickets in Jan-Mar, valid for booking till 31March. <https://www.kkday.com/en-sg/product/100299>

KAM

STS: Rail Europe look to expand distribution channels in Vietnam by signing new partners. Incumbent GSA WorldTrans temporarily close Hanoi office due to manpower crunch.

- SEA: STMS 2023 in Zermatt, 5 delegations from SEA
- SEA: STE 2023 in Phuket, 36 Swiss partners, 85 buyers from SEA
- TH: Visa Preferred Partner Scheme launch
- TH: Joint marketing activity with KA: Quality Express for family segment
- TH: Joint marketing activity with KA: FiftyPlusHoliday for family segment with wheelchair travelers
- TH: 15 FEB 2023, dinner event "The Wonder of Tourism 2023" by TTAA
- TH: 16 FEB 2023, opening ceremony of TITF#28 with embassies, NTOs, and media, KA booth visits.



KMM

- TH: Autumn & Winter 6-pages article on Prestige both print and online.
- TH: Swisstainable article on Luxuo Thailand
- MY: Article focus on sustainability in China Press
- MY: Winter article in Premier Travel 12 pages incl WHES ads
- MY: CH Illustration book was published.

Future Activities

- STS: Swiss Travel Pass FREE Travel Days promotion (15Apr-14May 2023), valid for travel through 13Nov 2023 (last 1st day of validity). See upcoming promotion here <https://www.mystsnet.com/en/swiss-travel-pass-free-travel-days/>
- SEA: 8th Asia Trophy in Switzerland, 23-28 March 2023
- KAM: ITMA Muslim family friendly famtrip, 10-19 March 2023

Interesting observations

STS: NATAS travel fair 24-26Feb saw increase in visitorships to about 100k visitors. Number of exhibitors increase from 40 to 55 versus 2022.

Top 6 SEA source markets for Japan in 2019:

- 1 Thailand - 1,143,100
- 2 Vietnam - 1,001,200
- 3 Philippines - 584,800
- 4 Indonesia - 509,400
- 5 Malaysia - 422,200
- 6 Singapore - 383,300

Top 6 SEA source markets for South Korea in 2019:

- 1 Vietnam - 491,303
- 2 Thailand - 384,310
- 3 Philippines - 294,493
- 4 Indonesia - 231,057
- 5 Malaysia - 189,553
- 6 Singapore - 160,426

Top 6 SEA source markets for Taiwan in 2019:

- 1 Vietnam - 423,584
- 2 Thailand - 347,731
- 3 Indonesia - 182,426
- 4 Philippines - 173,759
- 5 Malaysia - 129,017
- 6 Singapore - 112,121

Top 6 SEA source markets for Hongkong in 2019:

- 1 Thailand - 233,466
- 2 Indonesia - 154,147
- 3 Philippines - 153,856
- 4 Vietnam - 122,174
- 5 Malaysia - 116,850



Top 6 SEA source markets for Australia in 2019:

6	Singapore - 113,434
1	Indonesia - 224,500
2	Malaysia - 157,900
3	Singapore - 134,200
4	Thailand - 118,500
5	Philippines - 89,200
6	Vietnam - 76,900



2. Active Markets

SPAIN

Market Situation

Even though the market has finished 2022 with 10% less ON than in 2019, we see clear signs of a recovery in the Spanish market. The main holiday months, July and August, show figures above those of 2019 and in the month of December we beat all records with a +10% confirming the great interest of the Spanish people in our Christmas markets.

OECD's economic outlook note:

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.

KAM

eLearning Travel Expert Academy

Travel Expert Academy is an innovative, capsule-based learning platform, targeting more than 9'000 travel agents in Spain. 5 interactive capsules are being launched every week with a DEM and based on the following content

- Grand Train Tour of Switzerland + STP
- Grand Tour of Switzerland
- Boutique towns & Summer destinations
- Switzerland Travel Academy and MySPro

KMM

Media event

Exclusive event with Fribourg Region in Barcelona. Marielle from Les Paccots made a moitié-moitié fondue show cooking. Two radio and a television interview were arranged and 15 journalists participated

Mediatrips

Viajes National Geographic Print to Aletsch Arena, 05.-08.01

Group Mediatrip to Bern with 20Minutos Newspaper, Libertad Digital Newspaper, Crónica Global Newspaper, ABC Newspaper and Traveler.es, 02.-04.02.

El País Semanal Magazine & ElPais.com to La Chaux de Fonds, 15.-18.02

Viajes National Geographic Online to Carnival in Basel, 26.-28.02



Top Coverage

Top Girona Magazine: "Basilea, la capital cultural de Suïssa", 4 pages, 114'000 copies, 285'000 media contacts

20Minutos.es : "La región de Suiza donde vuelven a celebrar Nochevieja el 13 de enero", 1'586'000 online contacts

Elpais.com : "Diez razones para viajar a Saint Moritz más allá de disfrutar de la nieve", 1'919'250 online contacts

Woman Magazine: "Refugio de diseño", 1 page, 196'577 copies, 377'510 contacts

Diario Sport, "Silencio, se esquía sin ruidos ni estrés", 1 page, 64'652 copies, 381'649 print and online contacts

Qué fem? La Vanguardia, "Art i arquitectura a Basilea", 1 page, 104'696 copies, 612'000 contacts

Viajes National Geographic Print, "Aletsch", 4 pages, 526'994 print and online contacts

Fuera de Serie, "Zermatt, bajo la montaña perfecta", 8 pages, 30'508 copies, 72'313 media contacts

Diario Sport, "Descubriendo la meca alpina del freeride", 1 page, 64'652 copies, 381'649 print and online contacts

Tendencias.com, "Friburgo, fondue, quesos y otras joyas de la gastronomía suiza", 75'000 online contacts

Crónicaglobal.com, "El universo Miró conquista Berna", 175'000 online contacts

20minutos.es, "La capital de Europa en cuyo centro histórico vive una familia de osos", 1'586'000 online contacts

Hola.com, "Basilea, capital cultural y carnalera de Suiza", 650'000 online contacts

ElPais.com, "Leukerbad, el invierno más cálido de Suiza entre aguas termales", 1'919'250 online contacts

Libertaddigital.com, "La huella artística de Joan Miró triunfa en Suiza con una amplia exposición", 450'000 online contacts

Descubrir.com, "Murten, el encanto de la Suiza medieval", 150'000 online contacts

Travelprogram "Fem Turisme" in Radio Marca, Interview about the Grand Train Tour of Switzerland, 350'000 contacts

Travelprogram "Barcelonautes" in 25 TV & 8 TV, Interview about the Fribourg Region in Barcelona Media Event, 300'000 media contacts

Media Contacts: 11'797'615

Future Activities

- Booklet Made in Switzerland
- GToS map with the Touring Clubs
- B2C trade campaign



- Viajeros Callejeros at the GTToS in winter
- Promoting a specific TO package with a content creator