



Market Updates

May/June 2023

Editorial

Dear Partners,

Travel reports and outlook for the coming summer months in Switzerland are overall positive.

A closer look into our source markets reveals a great variety of market situations and development. Following the impressive performance in the first quarter of the year, the North American market is still riding strong: Switzerland is amongst the winner when it comes to growth in outbound travel to Western Europe. Meanwhile in some of our European markets, inflation remains a concern and consumer confidence, although improving, remains under its long-term average. Both the leisure and MICE Chinese markets are clearly picking up, visa and high prices challenges however curb the consumption.

Airline capacities increases at the same rate as ticket prices, the demand for train travel exceeds the supply. The car as means of transportation could become an alternative for some of our guests.

May and June traditionally see the roll out of our summer related campaigns, activations, and events in the markets. A myriad of key partner events, thematic launches, B2B leisure and MICE fairs took place worldwide.

We wish you a good reading.

Corinne Genoud
Head Market West



1. Priority Markets

BENELUX

Market Situation

Travel reports and outlook for the coming summer months are very positive. Booking indicators from most of our Trade partners show a very positive booking situation for Switzerland.

Our partner Intersoc in Belgium also reports almost full resorts in all of the 4 hotels in Switzerland.

The only minus point for a successful summer are the temporarily cancelled direct train connections from Amsterdam to Switzerland. Travellers have to change trains in Frankfurt and the reliability and quality of the connections remains unstable. Also for coming summer the majority of our guests will reach Switzerland by car.

Campaigning & Activation

Meetings

Belgium & Luxembourg:

- Boardroom Magazine: 2 pages about Geneva: Pioneering the Medical Field & 2 pages about Basel: BIO Europe Spring in Basel: A Conference With a Sustainable Impact 7'500 ex
- Enewsletter sent to SCIB Database: to 1'528 contacts: Theme: Switzerland- sustainable water pioneer
- eNews sent by Corporateplanner.be to 4'000 contacts. Small introduction and link to online article about Zurich
- eNews sent to SCIB Database to 700 contacts: Save the date for annual networking evening for corporate & association planners

City Marketing

Netherlands:

- Digital campaign with DPG media house to promote the Swiss Cities + Basel
- Digital campaign on sports related websites to promote the city of Bern regarding the 15th year of the Euro08

Belgium:

- Digital campaign with Roularta media house to promote the Swiss Cities + Ascona-Locarno
- Digital campaign with Roularta media house to promote Lausanne

Summer Marketing

Netherlands & Belgium:

- Shooting with Swisstable ambassador Evi Hanssen and cycling ambassadors Leon van Bon/Belle



de Gast in Switzerland, followed by an online campaign

- NKBV Influencertrip to VWP: Saas-Fee/Saastal, SoMe posts+stories of 6 Influencers from NL. Targeting younger segment. Hut to hut tour.
- Social media Swisustainable campaign on ST owned channels with traffic to dedicated MyS.com landing pages
- ANWB Reismee Publication Grand Train Tour spread 1.5 Mil.
- Oppad.nl SNP Wallis Nendaz - Aletsch Publications
- ANWB Camping Ticino online landingpage. Print in Go Camping magazine 250'000
- TV RTL Campingtijd 2 Switzerland Episode Ticino - Total 520'000 viewers. Interlaken Total 450'000 viewers
- Distribution of ST magazines green with media-house Roularta in Knack and Le Vif. New distribution method (opt-in) to prevent scattering losses. 2'873 magazine requests. 1'606 newsletter subscriptions.

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Meetings

Netherlands:

- Switzerland Meeting Trophy

Belgium:

- Business Dinner in Luxembourg with 30 corporate meeting planners and 5 Swiss partners: Crans-Montana, Davos, Pilatus Bahnen, Radisson Blu Andermatt, Swiss Int Air Lines. Theme: Water
- Switzerland Meeting Trophy with 7 participants
- BBT speed date workshop with 100 participants and 5 Swiss Partners: Geneva & Manotel, Pilatus Bahnen, Mövenpick Hotel Lausanne & Marriott Hotels Zurich

Trade

Netherlands:

- GTToS Publication offer ANWB from STC in "Reismee" circulation 1.5 Mil
- Sales Calls STS, RhB and VS
- Study Trip 10 Travel Club Agnet Focus GoldenPass, Overnight Thun+ Lausanne
- Incompany Studytrip DestinTravel in cooperation and accompanied by STC and STS
- TravMagazine 6 x half a page GTToS in weekly Magazine. In Netherlands and Belgium

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Meetings



Belgium & Luxembourg

- Headquarters Magazine: Destination interview: The Dawn of a New Sustainable Era in Switzerland!
12'500 ex

KMM

Netherlands:

- Summer Media Launch Amersfoort. Media and Kam Networking event to present our summer cycling & swisstainable campaigns and highlights. Participants: Partners & 35 Key Media & Trade Contacts. Swiss partners present: MiB, Valais, Ticino, Luzern, Graubünden, RhB, STS

Future Activities

Meetings

Belgium:

SCIB Annual Networking evenings 17 & 18.10.2023

Marketing Summer

Netherlands:

- NRC.nl + Qualis: exclusive summer campaign VWP: Print, Online, Newsletters, Bannering



1. Priority Markets

FRANCE

Market Situation

The political and societal situation in France remains quite tense with numerous riots in the main cities of France (Lyon, Marseille, Paris and its suburbs) in June. However the tourism industry is doing better than ever and booming for the upcoming summer season. Revenues from international tourism continue to grow +19% compared to 2019. Every month since the start of the year, the return of international clientele has been confirmed. Over these four months, signs of a rebound have appeared among Asian customers. By the end of May, occupancy rates in the hotel industry were back to levels close to those of 2019. Looking at the Google barometer of the most popular destinations for French people, France is well ahead of Spain followed by Italy and Morocco. (Source: Atout-France)

Campaigning & Activation

SCIB:

- 11 articles publiés sur le blog. 18 494 visites sur le blog au total.
- Webinaire “Zurich des lieux événementiels XXL pour le travail comme pour la fête.” 14 personnes ont participé en direct, 12 no show et 66 autres personnes pas dispo, mais intéressées par la thématique.
- Diffusion de l'e-news 03 “Nos idées estivales pour vos événements #RSE” à 2 226 contacts. Ouverture unique : 662 / Taux d'ouverture : 30,10% / Taux de clic : 2,6%
- Campagne Outbrain file rouge avec diffusion différents contenus (destinations, témoignages, thématiques ...) de MyS Meetings. 28 323 clics et un CTR moyen de 0,33.

MARKETING:

- Event in Paris from the 7th of June till the 10th of June. Creation of a Swiss Village in the 5th arrondissement of Paris in collaboration with Au Vieux Campeur. Several partners involved (BMC, Trauffer, Mammut, Swiss Wine). 6500 visitors in 4 days.
- Communication campaigns to boost the Event with trendy local media (Le BonBon, Paris Secret, Timeout)
- Fribourg Region was promoted through a social media campaign we have created with the media le Fooding. In addition, an event was organized in Paris during which the gastronomy from the region was highlighted.
- The 6 regions we mainly collaborate with (Valais, Bern, Fribourg, J3L, Vaud, Ticino) were promoted during the media campaigns we did with Le Courrier International, M Le Monde, Paris Tonic.

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SCIB:

- Business lunch Partance à Marseille : rencontre de 11 clients de 8 agences différentes. Dans



l'ensemble intéressant. Quelques nouveaux contacts.

- IMEX : Très peu de RDV en avance, mais 5 organisateurs événementiels intéressants. Assez décevant. De manière générale, peu de français sur le salon.

- The Meetings Space Split : RDV organisés de 23 clients + organisation de temps informels pour rencontrer davantage de monde. Les contacts ont été transmis aux marchés correspondants.

- 17e Switzerland Meeting Trophy : Très compliqué une fois de plus de recruter des agences qui croulent sous le travail en juin... Finalement quand même une jolie équipe - entièrement féminine - de 5 agences plus une journaliste de MeetAndTravelMag. Pour la plupart c'était une première expérience de la Suisse et elles ont adorée et étaient bluffées par notre offre

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- Evenement médias le 1er juin à la galerie d'art 3e Cercle. Avec Fribourg Région: actu de Fribourg + lancement de l'été suisse. 9 journalistes présents. Networking autour d'une fondue préparée par les journalistes.

- Suite à l'événement: newsletter dédiée Fribourg envoyée à plus de 600 médias.

- Accompagnement d'un tournage TF1 (Pilatus et Parc national suisse)

- Nombreux key medias trips (TF1, France 3, Le Monde, Le Figaro, Ouest-France).

Future Activities

SCIB :

- Afterwork à Lyon le 3 juillet

- Participation à L'Estivale de l'événement le 4 juillet

- afterwork fin août dans nos locaux ?



1. Priority Markets

GCC

Campaigning & Activation

-First Hia Health Editorial: May 2023, feature about Mental Health in Hia Magazine, an Arabic monthly women's magazine. Contacts: 350'000. Partners: The Kusunacht Practice, Privatlinik Meiringen, Privatlinik MENTALVA, Clinic Les Alpes, NEOVIVA, University Hospital Zurich.

- 100% Women Celebrity trip with Sheikha Madiya from the royal family of Dubai from 12-19 May to Geneva, Crans Montana, and Lugano.

- Saudi Moshaya Family is visiting Zurich and Davos in June, producing 1 video each destination generating around 15Mio views.

- 29 May – 9 June: Interlaken & Jungfrau Radio campaign. Content: MiB, Interlaken & Jungfrau Region, with Sweepstakes. In total 184 radio spots, sweepers, promos, RJ mentions on Emarat FM. Contacts: 9.3mio.

- 15 April – 31 May: STP Al Rostamani campaign. Content: Swiss Travel Pass. Partners: STS and RailEurope.

- Production and distribution of Swisustainable brochure. 10,000 brochures through Emirates Women Magazine, featuring all Swiss destinations, special sections on hotels, nature, service pages, visa, STS and Swisustainable. English and Arabic.

- 22 May – 31 June: Swisustainable via ISSUU. Partnership with 7awi to generate 100,000 Arabic speaking users for Issuu version of Swisustainable brochure.

- Production and distribution of family brochure. Contains 9 family hotels in 8 different regions. Distribution via Hia in June Issue (English and Arabic).

- Production and distribution of luxury and lifestyle brochure. Contains 17 luxury hotels in 12 different regions. Distribution via Kul Al Usra in June issue.

- Various luxury digital campaigns, promoting Lugano, Graubünden, Gstaad, Geneva.

- Luxury Hotel and family Hotel, digital push on Facebook.

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-STM Health took place from the 25th-27th of June, followed by 4 different post-convention tours with different medical focus areas from the 28th - 30th June. The GCC participated with 9 buyers from the UAE, KSA and Kuwait.

- 1-4MAY. Participation at Arabian Travel Mart, biggest trade fair in the middle east: Topic: Swisustainable, Roger taking the train, showcasing the Switzerland. Roughly 20'000 participants.

- GCC @STM Health: From the 25th - 30th June, eight medical stakeholders, such as doctors, government representatives, medical and luxury agents from the GCC will participate at the STM Health 2023.

- Handover-Event: Farewell Matthias Albrecht, Welcome Livio Goetz. 50 key personalities from media



trades, travel agents and other relevant partners (SWISS, EDA, SBC, etc.)

- 12 June: Luxury Newsletter, 2,793 recipients. Partner: Geneva, Vaud Region, Interlaken, Gstaad, Graubünden, Lugano.

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- Health Editorials: 4times, 2 page health advertorial plus digital support through Hia magazine, a leading female Arabic magazine. First editorial will be published in the May edition of the magazine.

- 3 Groupmedia trips from KSA (2), UAE and Qatar (1).

- 3 – 7 June. Media Trip from UAE and Qatar. 5 journalists travelling to Davos and Zermatt.



1. Priority Markets

GERMANY

Market Situation

Vertrieb

Der touristische Vertriebsklima-Index der Unternehmensberatung Dr. Fried & Partner ist auch im Juni leicht gesunken. Bei den Erwartungen an die Zukunft ist eine leichte Zurückhaltung zu verzeichnen. In Bezug auf den Vertrieb von Reiseleistungen schätzen mehr Reisebüros als im Vormonat die Lage als lediglich befriedigend ein. Die aktuelle Lage wird weiterhin von über der Hälfte aller teilnehmenden Reisebüros als gut eingeschätzt (52%; Vormonat: 56%). 43 Prozent der Teilnehmer bezeichnet die aktuelle Lage beim Vertrieb von Reiseleistungen als befriedigend, das sind 6,5 Prozentpunkte mehr als im Mai. Der Anteil derer, die eine Verschlechterung der Lage feststellen, sinkt auf 5 Prozent (Vormonat 8%).

Konsumenten

Rund ein Drittel der Bundesbürger sieht keinen Einfluss der Inflation auf ihre persönlichen Reisepläne, hat die Forschungsgemeinschaft Urlaub und Reisen für den Online-Reiseverband VIR aktuell ermittelt. 16 Prozent achten hingegen aufgrund der gestiegenen Lebenshaltungskosten verstärkt auf den Reisepreis oder suchen nach Sonderangeboten.

Die Verbraucherstimmung insgesamt ist auch im Juni von leichter Verunsicherung geprägt. Während die Anschaffungsneigung leicht zunimmt, müssen Konjunktur- und Einkommenserwartung Einbußen hinnehmen. Die Gesellschaft für Konsumforschung (GfK) prognostiziert für das Konsumklima im Juli -25,4 Punkte und damit einen Punkt weniger als im Juni dieses Jahres (revidiert -24,4 Punkte). Der Rückgang des Konsumklimas wird insbesondere durch den erneuten Anstieg der Sparneigung um gut fünf Punkte verursacht.

Wirtschaft

Die aktuelle Konjunkturprognose des ifo-Instituts vom 21. Juni sieht für die deutsche Wirtschaft im zurückliegenden Winterhalbjahr einen kräftigen Rücksetzer. Als Folge der hohen Inflation würde sich die Nachfrage spürbar abschwächen. In diesem Jahr würde das Bruttoinlandsprodukt um 0,4% zurückgehen und im kommenden Jahr um 1,5% zunehmen. Die Inflationsrate dürfte von 6,9% im Jahr 2022 auf 5,8% im Jahr 2023 und 2,1% im Jahr 2024 sinken, so das Institut.

Best practice competitors

Worst Practice aus Philippinen: Eine vom Tourismusministerium beauftragte Agentur zeigt in einem Werbefilm namens "Love the Philippines" fälschlicherweise Bilder anderer Destinationen u.a. Fotos von Flughäfen in der Schweiz. Der Vertrag mit der Agentur sei gekündigt worden. Der Fauxpas ging trotzdem viral.

Campaigning & Activation

Beatrice Egli:

100% Women: Die Schweizer Sängerin und Moderatorin stellte sich Anfang Juni ihrer persönlichen



Cycling Challenge und meisterte den Höchst-Trail in Adelboden mit dem Mountainbike. Dabei wurde sie von einer Produktion begleitet, die Foto- und Videomaterial für eine Social-Media-Kampagne erstellt. Distribution erfolgt im August.

Tessin: In Ascona Locarno und den umliegenden Tälern verbrachte Beatrice einen unvergesslichen Urlaub. Dabei wurde Content für eine anschließende Digitalkampagne erstellt. Distribution erfolgt im Juli.

Grand Train Tour of Switzerland:

Sommer Recovery Kampagne: Weitere Artikel im Burda-Universum zu Roger Federer und der Grand Train Tour of Switzerland. Grosser Fokus und Bewerbung auf den Digital Brand Hubs von FOCUS.de und ELLE.de.

Digitale Sommer Key Partner Kampagne: Von Mitte Juni bis Mitte Juli ist die digitale Key Partner Sommerkampagne zum Thema Grand Train Tour of Switzerland live. Zwei deutsche Influencer sind zwei Panoramazugstrecken abgefahren und haben nachhaltige Sommerlebnisse in den Key Partner Regionen mit Bild und Video erfasst. Der Content wird auf MySwitzerland.com zusammengefasst und über Paid Media beworben.

Blogger Kampagne: Die Bloggerinnen @couchflucht und @vielunterwegs waren auf einem Road Trip durch die Schweiz unterwegs. Daraus resultieren SEO-optimierte Blogposts und eine inspirative Kampagne auf Pinterest. Distribution erfolgt im Juli/August.

Swisstainable Recovery Kampagne: Die ZEIT Online Redakteurin Julia Loibl war vom 26.-29.06. in Graubünden unterwegs, um Nachhaltigkeit, Natur und Swisstainable live zu erleben. Ihre Ergebnisse werden in der Digital Branded Story @Zeit online eingehen, welche ab September live geht.

Made In Bern (MiB) Geo Nature Camp: Die 3 Gewinner des GEO Naturecamps mit MiB konnten ihre Gewinnerreise vom 27.06.-02.07.23 antreten und die aktiven Höhepunkte der Region Bern erleben. Ihre Ergebnisse und Fotos werden im September via GEO digital und GEO print veröffentlicht.

Luzern Vierwaldstättersee Podcast mit ZEIT Reisen: 3 produzierte und veröffentlichte Folgen für den Podcast "Überm Berg" in Zusammenarbeit mit Studio XZ von ZEIT Reisen. Auf allen gängigen Podcastplattformen erhältlich.

Basel Kooperation mit IDEAT: 14-seitiges Native Content Special zur Herausstellung von Basel als Kunst- und Kultur Metropole.

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MICE:

Studienreise an den Genfersee: Vom 05.-07.05.2023 organisierte SCIB zusammen mit Lausanne und Montreux Tourisme eine Studienreise für Eventplanende aus Deutschland. Es haben insgesamt 7 MICE-Planer teilgenommen.

Newsletter: Am 12.05.2023 wurde der zweite Newsletter des Jahres mit dem Titel «Inspiration» an 1.763 deutsche MICE Kontakte versendet.

Green Mile in Kopenhagen: Vom 11.-13.05.2023 fand die Green Mile in Kopenhagen statt, eine Fachveranstaltung für Veranstaltungsplaner, die zum großen Teil aus Deutschland kommen. Ziel war es, praktisches Wissen zu vermitteln, wo am besten nachhaltige Veranstaltungen organisiert werden können. Insgesamt kamen über 40 Teilnehmer und 16 Anbieter zusammen.

IMEX Frankfurt: Vom 23.-25.05.2023 fand die IMEX (eine der wichtigsten Fachausstellungen für den



MICE Bereich) in Frankfurt/Main statt. Die Schweiz wurde durch 19 Partner (z.B. Destinationen, Hotels) und ausgewählte SCIB Märkte präsentiert.

7. Switzerland Meeting Trophy: Vom 22.-25.06.2023 fand die Switzerland Meeting Trophy zum 17. Mal statt. Internationale Veranstaltungsplaner wurden zusammengebracht, um die Schweiz als Meeting & Incentive Destination (Engadin/Zürich) zu erleben und bei einem spannenden Wettstreit für das eigene Land zu gewinnen. Das deutsche Team wurde vom CIM Magazin begleitet, welche kontinuierlich über die Veranstaltung medial berichtete.

Meet & Greet Tour mit Luzern Vierwaldstättersee:

Inhaltlicher Schwerpunkt auf Grand Train Tour of Switzerland, Swisstainable und Kulinarik.

- 12. Juni in München, LUXON Zug mit 18 Teilnehmenden
- 13. Juni in Stuttgart, Alte Kanzlei mit 19 Teilnehmenden
- 14. Juni in Köln, Kochschule esswahas mit 14 Teilnehmenden
- 15. Juni in Giessen, heyligenstaedt mit 13 Teilnehmenden

Meet & Greet Tour mit Bern: Inhaltlicher Schwerpunkt auf Grand Train Tour of Switzerland, Swisstainable und Kulinarik.

- 30. Mai in München, Kochschule Feinschnabel mit 20 Teilnehmenden
- 01. Juni in Frankfurt, Radio Frankfurt mit 34 Teilnehmenden

Expipoint “Europe’s most beautiful destinations” Roadshow vom 22.-26.05.2023; Teilnahme an Roadshow von Veranstalter Expipoint am 23. Mai in Düsseldorf mit 62 Teilnehmenden.

LOOP Luxus B2B Event in München mit 41 Teilnehmenden.

Schweiz Akademie Inforeise vom 25.-30.06. mit je 10 Teilnehmenden pro Tour // Gewinner Absolvent:innen der Schweiz Akademie.

Tour 1: Graubünden + Tessin. Tour 2: Bern & Luzern Vierwaldstättersee. Schlussabend gemeinsam in Zürich. Fokus auf GTToS & Swisstainable.

DER Touristik Talk & Dine, Leipzig & Würzburg. Präsenz zusammen mit Luzern Vierwaldstättersee bei Expediten-Anlass von DER Touristik. 71 Teilnehmende mit grossem Schweiz-Interesse.

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Kulturevent mit Basel Tourismus in Schweizerischer Botschaft Berlin

Sechs Vertreterinnen und Vertreter der Basler Kulturinstitutionen wie das Kunstmuseum Basel, das Symphonieorchester oder das Vitra Design Museum präsentierten am 3. Mai insgesamt 29 Medienschaffenden aus den Bereichen Kunst, Kultur und Architektur (Weltkunst, ZEIT Magazin, FAZ) ihre Neuigkeiten mit anschließendem Networking in Anwesenheit des Botschafters Dr. Paul Seger.

Redaktionsmeeting Burda mit Graubünden, Wallis, Bern, Luzern Vierwaldstättersee und Ticino. Speed-Dating (1:1-Meetings) mit 10 Redakteuren u.a. von Focus, ELLE, Sports Illustrated, Playboy, Bunte. Fokus auf News, GTToS und individueller Pitch passend auf das Medium adaptiert.

Afterwork Apéro mit Medienschaffenden aus Stuttgart mit 8 Teilnehmenden vor Sommerpause. Abschied von Trainee Julia Hürbi und Willkommen der neuen Trainee Lisa Hasler (ab Juni 2023).



Individuelle Medienreisen: Über 50 individuelle Reisen in die Schweiz hat das KMM-Team Deutschland im ersten Halbjahr für Medienschaffende organisiert.

Gruppenmedienreise Genf in Kooperation mit SWISS (16.-18.06.2023): Umsetzung einer Medienreise zur neuen Direktflugverbindung HAM-GVA, an der 3 Medienschaffende von Brigitte, MERIAN und dem Manager Magazin teilnahmen.

Gruppenmedienreise Basel „R(h)ein ins kulinarische Basel“ (29.06.-01.07.2023): Umsetzung einer kulinarischen Medienreise nach Basel mit 7 teilnehmenden Medienschaffenden u.a. von Stuttgarter Zeitung / Stuttgarter Nachrichten, Hogapage, Mittelbayerische Zeitung, Blog Bohème sowie der freie Journalist und Gastrokritiker bei der NZZ, Wolfgang Faßbender.

Future Activities

Digitales Advertorial SZ/FAZ mit Winterthur: Advertorial und verschiedene Werbemittel (Banner) im Kampagnenzeitraum 24.07.-03.09.2023.

Digitale Swisstainable Branded Story @ZEIT online: Entlang der Grand Train Tour werden Swisstainable Höhepunkte mittels verschiedener medialer Hilfsmittel (u.a. Podcast, Interview, etc.) digital erzählt und umgesetzt. Distribution ab 01.09. Eingebundene Regionen: Zürich, Luzern Vierwaldstättersee, Graubünden und Tessin.

Digitale Kampagne Swiss Cities mit Condé Nast: Visual Advertorial zu den Swiss Cities in Verbindung mit Brunnenbaden und Leben am Wasser auf AD online sowie Bewerbung über Social-Media-Kanäle AD, GQ und Vogue und AD-Newsletter, Kampagnenzeitraum: Juli / August 2023

Made In Bern Geo Nature Camp: Print Advertorial zum GEO Naturecamp mit MiB mit Erscheinen in der GEO Septemberausgabe.

SDH-Event mit SALON: Im September findet in Kooperation mit Swiss Deluxe Hotels (SDH) und dem Magazin SALON ein festlicher Anlass in Düsseldorf statt. Sternekoch Yannick Crepaux bekocht die 80 geladenen Gäste in Sammlung Philara für zeitgenössische Kunst.

Bahntastische Schweiz: Unter diesem Motto finden in Stuttgart (27.7.23) und Frankfurt (3.8.23) die 1. August Feierlichkeiten der Generalkonsulate statt. Außerdem auch am 8.9.23 in Berlin im Technikmuseum, organisiert durch die Schweizer Botschaft. Schweiz Tourismus ist bei allen drei Anlässen touristischer Partner

Herbstkampagne mit der Deutschen Bahn: Ab dem 8.9.23 für zwei Wochen findet in Kooperation und im Auftritt der Deutschen Bahn eine digitale Kampagne (Out of Home Plakate, Bannerwerbung auf diversen Online-Kanälen, TV und Youtube) zur Bewerbung des Schweizer Herbstes. Quellmärkte sind Hamburg, Düssel/Köln, Frankfurt, Mannheim und München

Interesting observations

Medienlandschaft in Deutschland: Nachdem die RTL Group und Bertelsmann im Februar 2023 bekanntgegeben haben, sich von über 20 Titel aus dem Portfolio zu trennen, steht die Verlagswelt in Deutschland Kopf. Vor wenigen Wochen gab Axel Springer bekannt, bei seinem Flaggschiff BILD über 200 Stellen zugunsten der Digitalisierung (u.a. AI) des Boulevardballts zu streichen. Auch unabhängige Verlage leiden: Die Frauenzeitschrift emotion aus Hamburg musste Ende Juni Insolvenz anmelden. Diese Beispiele stehen stellvertretend für die Krise der klassischen Medien, die weiter voranschreiten wird.

Neue Botschafterin in Berlin: Livia Leu, ehemalige EU-Chefunterhändlerin, wird ab November die Nachfolge von Dr. Paul Seger antreten und die Interessen der Schweiz als Botschafterin in Berlin vertreten.



1. Priority Markets

GREATER CHINA

Market Situation

MICE market is recovering but meet some challenges for resources, e.g. flight options and visa.

- visa situation is improving but still challenging due to high demand
- CNY weak, CHF strong, further influence bookings in Q3/Q4
- Flight tkts prices remain high China -Europe

LEISURE

- The market is clearly picking up, although the May/June Figures will provide a better overview of what can be expected from the Summer season.
- While people are happy to travel again, high prices and uncertainty is curbing consumer confidence
- Heat waves all over the country are driving people to escape to colder places over the Summer

Best practice competitors

- NZ Tourism Minister visit China, high level MOU on headlines, and official launch RED account
- Spain was early and active to invite media, KOL and key accounts back before everyone else and were thus quite visible in the industry
- Australia is launching a highly visible (and likely very expensive) campaign with 3D platforms, since visa and flights are challenging for Europe, this is a great momentum for Oceania.
- Canada and the Nordics both work on sustainable travel with Mafengwo, launching a series of panels and activities

Campaigning & Activation

- Ctrip Campaign: launch 08June, with 9 Swiss partners, focus recovery and Swisustainable. STP & 15 days mono-Switzerland FIT product development and sales push. Expected 6 millions marketing contacts
- So Swiss Showcase in Suzhou on 10June
- The Grand Train Tour Campaign with Roger Federer was completed, overshooting targets
- In Taiwan a Grand Train Tour campaign has launched and will last until September

KAM



SCIB:

- IMEX pre-tour with Accorhotel China with a delegation of 12 pax (18-22 May)
- Accorhotel Showcase in Beijing(13 June) and Shanghai (15 June).

Leisure:

- Caissa Touristic Swisstaibnable Grand Train Tour series group, total 60 pax, 840 overnights
- Trade webinar May: BLS, Jungfrau partners
- Trade webinar June:

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- Booking.com sustainable media event
- Summer kick-off media event in Beijing, Guangzhou, Hong Kong, Shanghai and Taipei are taking place throughout June and July, paired with an experiential water activity
- Interviews with Caissa by NZZ and the Swiss National Television push the narrative of new and progressing travel interest from China
- 1 participant from China for International media trip Magic places end of May, Thurgau, Appenzell, Valais
- 2 participants from greater China for international media trip 100% women cycling, St.Moritz, Ticino, Gstaad

Future Activities

SCIB:

- Destination wedding promotion in Macau on MITE fair (30 June - 2 July)
- Individual sales call in south China, visits of end consumers and agencies (3 - 7 July).
- Zurich Webinar training 1: 11 July.
- Destination Wedding: Chinese Valentine's Day B2C event: 22 August
- Destination Wedding: Chinese Valentine's Day Wedding planner swiss brunch event in Beijing: 22 August

Leisure:

- classic trade roadshow end of August, 10 events, 8 swiss partners
- trade webinars July/August



1. Priority Markets

ITALY

Market Situation

Economy:

GDP in Italy appears to have increased slightly in the first quarter of 2023.

Economic activity increased slightly in Italy in the first quarter of this year, driven by the manufacturing sector, which benefited from energy prices falling and supply chain bottlenecks easing. Household spending remained weak, as inflation was still high. Capital accumulation instead continued. In the early months of the year, growth in Italian exports remained positive, the current account balance returned to positive territory and employment continued to rise.

The fall in inflation is driven by the energy component, while core inflation remains high.

Inflation went down on average in the first quarter (to 5,1 per cent in May) but core inflation rose, continuing to be affected by the pass-through to final prices of the higher costs linked to the energy shocks. Wage growth remained moderate; firms' profit margins increased slightly.

Tourism:

Various surveys of tourist portals have revealed that Italians are returning to travel. 66% will choose domestic destinations, 34% will go abroad of which 29% will opt for trips to Europe. About 5% will choose long-haul destinations.

Holiday periods will change, however.

46% took their holidays in June because of low season rates

27% will go on holiday in July and 12% in August

Different trends regarding the length of stays:

29% of travellers opted for the classic two weeks (7 to 13 days), 32% booked for three to four days, 15% for a week (five to six days)

Holidays in the mountains will be stable at 20% and there will be slight upturn in urban tourism at pre-pandemic levels (18%)

68% will travel with family and 8% alone

50% will travel by car and 5% by train, 44% will prefer holidays in hotel, 22% in appartements and 8% in campsites

topic trends: open air activities, slow travel, hiking and biking

Campaigning & Activation

ST E-Newsletter May

Date: 02.05.2023



What: E-Newsletter May

Focus: Giro d'Italia / Valais, Swiss Travel Pass Promotion

ADV on ballet program of "Teatro alla Scala" Milano

Date: 10.05.2023

What: 2 pages advertising on ballet program of William Forsythe

Distribution of all guests on location

Circulation: 5'000 copies

Partner: Vaud Promotion

Swiss Cup 2023 Golf club Parco di Roma

Date: 13.05.2023

What: Golf competition at Golf club Parco di Roma

Distribution of ST brochures

Contacts: 100

Partners involved: Appenzeller Bier, Victorinox, SCM, Guarda Golf Hotel, RhB, STS

Swiss Cup 2023 Golf club Fioranello

Date: 20.05.2023

What: Golf competition at Golf club Fioranello

Distribution of ST brochures

Contacts: 100

Partners involved: Appenzeller Bier, Victorinox, SCM, Guarda Golf Hotel, RhB, STS

Distribution Amos Booklet with Elle Decor Magazine

Date: 20.05.2023 (issue of May)

What: Distribution of the Art of Museum Booklet with Elle Décor Magazin – monthly issue

Circulation: 20'000 copies

Area: Lombardia, Piemonte, Valle d'Aosta, Liguria

Evening in collaboration with ANICA

Date: 23.05.2023

What: Event in collaboration with ANICA (Associazione Nazionale Industrie Cinematografiche Audiovisive) to present a film of Festival del Cinema di Locarno

Where: Reale Circolo Tevere Remo

Contacts: 100



Distribution of ST brochures

Partner: SCM

Swiss Cup 2023 Golf club Terra dei Consoli

Date: 28.05.2023

What: Golf competition at Golf club Terra dei Consoli

Distribution of ST brochures

Contacts: 100

Partners involved: Appenzeller Bier, Victorinox, SCM, Guarda Golf Hotel, RhB, STS

Influencer Trip with Ilary Blasi in Lugano

Period: 12. - 14.05.2023

What: Trip to Lugano with Ilary Blasi (2.2M followers)

Contents: 1 post and stories

Partner involved: Lugano Region

Influencer Trip with Giovanni Arena in Ticino

Period: 15. - 17.05.2023

What: Trip to Ticino with Giovanni Arena (481k followers)

Contents: 2 post, 1 reel and stories

Partner involved: Ticino Region

Influencer Trips to participate at the Drone Show in Geneva

Period: 18. - 20.05.2023 – Antonio Di Maiolo (255k followers)

Period: 19. - 20.05.2023 – Tatiana Biggi (51,5k followers)

Period: 19. - 21.05.2023 – Dorian Pellumbi (158k followers)

What: Trip to Ticino with Giovanni Arena (481k followers)

Contents: 1 post, 1 reel and stories

Partner involved: Geneva Tourism

Influencer Trip with Ambassador Filippo & Filippo in Lugano

Period: 22. – 23.05.2023

What: Trip to Lugano with Filippo Cirulli (154K followers) & Filippo Fiora (177K followers)

Contents: 1 post and stories each

Partner involved: Lugano Region



Campaign Trenitalia/SBB: second wave “Spring”

Period: 10.05. - 10.06.2023

Digital campaign (social media and display adv) on different platforms to promote special discount PROMOSVIZZERA23 and springtime in the main Swiss Cities.

Visual with Michelle Hunziker onboard of EC train with Bellinzona in the window and video with Michelle in Ticino; claim “Visita la Svizzera che ti sorprende”

Platforms involved: Citynews, Lastminute.it, 3b Meteo / Youtube / website Trenitalia.com & onboard monitors of Frecciarossa trains.

Partners: STS, Ticino and Swiss Cities

Results:

- Marketing contacts (paid social media & digital campaign): 12,9 million
- Organic social media (post & stories on myswitzerlandIT): 3,7 million impressions
- Earned media contacts (online & radio): 2,7 million

STS/RF: Advertorial on La Freccia Magazine

Period: Issue of June

What: 2 advertorial pages on monthly magazine LA FRECCIA

Subject: Grand Train Tour with paragraph dedicated to Swiss Travel Pass and Eurocity Trains

Circulation: 100.000 copies on board and 5.000 copies distributed during events

Readers: 262.500

Geneve: Native Article on Corriere della Sera

Date: June

On viaggi.corriere.it 1 native article, 1 launch with newsletter, Post and story on SOM

Partner: Geneve

Geneve: Branded Article on Dove Travel Magazine

Date: June

What: 3 pages branded article on Dove Travel Issue

Area: National

Contacts: 405k

Partner: Geneve Tourism

Trip to Interlaken region with Michelle Hunziker

Date: 31.05. – 01.06.2023

-What: Trip with Michelle Hunziker to Interlaken and Jungfraujoch



-Stay in Interlaken at Hotel Victoria Jungfrau and ride to Jungfrauoch Top of Europe

-Content production

-Interview with CHI Instagram TV, Telezüri and Schweizer Illustrierte

-Daily stories on Michelle's Instagram about backstage and various location

Contacts: 2.608.159 impressions

Partners involved: Interlaken Tourismus, Jungfraubahnen

OOH Campaign at Swiss Corner Milano to promote Summer in the Swiss Cities

Period: 05.06. – 18.06.2023

What: OOH Campaign on Swiss Corner Bar

9 Lightbox and 1 Video on Ledwall

500'000 impressions

Partner: Bern, Basel, Zürich, Winterthur, Lugano, Lucerne, Geneva, STS

Swiss Cities Campaign at Virgin Active Clubs

Period: 05.06. – 18.06.2023

What: Presence in 40 Virgin Active Gym Clubs from North to South Italy to promote Summer in Swiss Cities.

30sec Videos on led of cardio fitness machines, maxi touch screens and totems at the entrance of the clubs

Content on Concierge Page with link to svizzera.it/città landingpage, 1 eNL to the database of Virgin Active with link to svizzera.it/città landingpage

116'934 eNL recipients, click rate 2.01%, 48.36% open rate / 508.537 club visitor / 12.072 video views / 200.000 impressions and 40.000 web sessions

Distribution: 4'000 Hotel Brochure SPA & Vitality

Partners: Bern, Basel, Zürich, Lugano, Lucerne, Geneva. Lausanne

StraPa: Rausch

ST E-Newsletter June

Date: 06.06.2023

What: E-Newsletter June

Focus: Swiss Bike Hotels / PromoSvizzera23

ADV on ballet program of "Teatro alla Scala" Milano

Date: 07. and 24.06.2023

What: 2 pages advertising on ballet program of Gala Fracci and Romeo Giuletta



Distribution to all guests on location

Circulation: 10'000 copies

Partner: Vaud Promotion

Swiss Cup 2023 Golf club Acquasanta

Date: 11.06.2023

What: Golf competition at Golf club Acquasanta

Distribution of ST brochures

Contacts: 100

Partners involved: Appenzeller Bier, Victorinox, SCM, Guarda Golf Hotel, RhB, STS,

Influencer Trip Bern Region

Period: 18. - 22.06.2023

What: Trip to Bern Region with Angelica Massera and family (396k followers)

Contents: 4 post, min 4 stories and 1 TikTok video

Partner involved: Bern Region, Berne City, Interlaken, BLS, STS, SWISS

City Campaign Influencer Trip Geneve

Period: 23. - 25.06.2023

What: Influencer Trip for the city campaign to Geneve with Giovanni Arena (497k followers)

Contents: 2 IG reel, min 12 stories and 1 Tik Tok Video

Event at "Istituto di Cultura Roma" to celebrate the Swiss National Day

Date: 27.06.2023

Swiss National Day in Istituto di Cultura Svizzero in Roma

Organized by Swiss Embassy

Partners: RhB

Sponsorship by Appenzeller Bier

Influencer Trip with Lugano Region

Period: 27. - 28.06.2023

What: Trip to Lugano Region with the Italian celebrity Federica Fontana (316k followers)

Contents: 1 reel, min 4 stories

Partner involved: Lugano Region

Participants: 800



Matterhorn Alpine Crossing with Michelle Hunziker

Date: 30.06.2023

What: Moderation of the opening event of the Matterhorn Alpine Crossing by ST ambassador Michelle Hunziker

14 stories on Michelle Hunziker's Instagram profile (5.7 M followers)

Over 40 media results on Italian media in the one week (123 M unique users)

Over 500 participants at the opening event

Content production for the partner (video spot)

Partners involved: Zermatt Bergbahnen

OOH "Roger Federer"/GTToS

Date: 15.06.-30.07.2023

What: Out of home "RF23" campaign including:

- 4 vintage full-wrap trams with 4 different visuals in Milano (15.06.-30.07.2023)

- 70 digital bus shelters with 15" snippets in Milano (26.06.-02.07.2023)

- 139 digital bus shelters with 15" snippets in Milano (02.-09.07.2023)

- 387 digital bus shelters/digital vision metro with 15" snippets in Milano, Bologna, Genova, Torino, Roma, Brescia (10.-16.07.2023)

Results in the Market Update July-August

KAM

Trade Workshop Milano

Date: 04.05.2023

What: Workshop for trade with Albatravel at Swiss Corner

Launch monography Switzerland with Albatravel

44 trade representatives

Partner: Bern/BLS/Talk, Valais/MRAG/Aletsch Arena, Ticino/Monte Generoso/SwissMinatur/Centovalli, Lucerne, Geneva, Montreux, RhB, STS, Goldenpass

E-NL il Cioccolatoino: exclusive Monte Generoso

Date: 26.06.2023

What: e-Newsletter on Monte Generoso with focus on Summer News



Fam Trip Berner Oberland Pass

Date: 15. – 17.06.2023

Fame Trip to discover Berner Oberland Pass

Focus: Berner Oberland Pass

Escursions in Adelboden, Sentiero dei Fiori, Blau See

Partners: Adelboden-Lenk, Kandersteg, BLS

KMM

Media results

- 28 million
- 20 journalists invited to Switzerland
- 2 media newsletters about Michelle in Ticino & special Eurocity discount / opening of Matterhorn Alpine Crossing.

Top coverage

- Article about Gornergratbahn on Lastampa.it (55'000 weekly visits; publication date: 15.06)
- Article (2 pp.) about Basel art & architecture on weekly women magazine F (readers: 420'000; publication date: 13.06)
- Article (2 pp.) about Michelle Hunziker in Ticino on weekly women magazine Donna Moderna (readers: 1,2 million; publication date: 22.06)
- 3 episodes (each 45 minutes) about Grand Tour of Switzerland and Swisstainable experiences on TV broadcast Donnavventura on national channel Rai2 (audience: 1,4 million each episode; on air on 11, 17 and 18 of June)

Group media trip

- Trip in Basel (12-14.05.2023) discovering Novartis Campus, Vitra Campus, Beyeler, Kunstmuseum and boat tour on the Rhine; Participants: 7 journalists.
- Trip in Ticino (22-24.06.2023) focus on activities for family; Participants: 7 journalists.

Media roadshow

Visit of editorial offices in Varese (La Prealpina / Varesenews) and in Como (La Provincia) with Ticino Turismo; Participants: 8 journalists; Date: 31.05

Future Activities



Swiss Family Village

Period: September 2023

What: Activity on Piazza Gae Aulento with focus Autumn, Swisustainable / target group: Families, generation Alpha and Z / Setup of a Village with outdoor playground, circus tent, partner stations / involvement of schools through dedicated workshops and outdoor activities

Partner: Bern Region, Ticino, Zürich, STS, RhB

OOH RF23

Period: August-September 2023

What: Video display at the 80th Venice International Film Festival



1. Priority Markets

NORTH AMERICA

Market Situation

The tourism industry in North America experienced continued recovery and positive growth during the months of May and June 2023. Following the impressive performance in the first quarter of the year, both the United States (May + 25,7%) and Canada (May +16,7%) saw big increases compared to 2019 figures. The forecast until the end of the year is looking very promising, with Switzerland being among the big winners in terms of %growth within Western Europe.

The MICE industry is strong contributor to the growth in overnights with North America currently being the best performing SCIB market.

STP sales are up by 273% (USA) and 242% (Canada) in comparison to 2019. 48% of the sold STP are issued for either 8 or 15 days. These amazing figures do indicate amongst others also a shift from GIT to FIT.

The USD and CAD / CHF exchange rates are currently not favourable, which in the longrun might have some negative impacts on bookings and our guests certainly will feel the difference in their spending power on vacation in Switzerland compared to last year.

In the US the economy stands on solid ground mid-way through 2023 as consumer spending remains resilient and businesses continue to hire. However, we see storm clouds on the horizon and anticipate a mild recession towards the end of the year as the Fed remains reluctant to take its foot off the brake while credit conditions tighten further.

Campaigning & Activation

Campaigning & Activation

- Cities/Edelweiss Digital Campaign, ongoing until end of Aug
- Hotels/Accommodation Campaign w/ AFAR, ongoing until fall
- Reoccurring social campaign to gain eNL subscribers, ongoing until the end of the year
- Distribution Touring magazine w/ LA Times, May 7
- Hopper Campaign w/ Made in Bern & Graubunden, May 12-end of Aug
- TSQ Billboard, as of June 5-ongoing
- BLUM podcast campaign, June 28-Sept
- Valais Matterhorn campaign w/ Nico Hischier, June-Oct
- ETC Campaign Europe and Switzerland for Canada (June - July)
- Distribution of Flyers on Schengen Visa issued in SFO, TOR, MOR (June - Oct)



KAM

KAM

- Trade webinar with BLS - Interlaken Lake Cruise, May 4
- Trade webinar with Edelweiss, May 18
- Switzerland Travel Experience USA (San Antonio, Denver, Miami), May 20 - 26
- Switzerland Travel Experience Canada (Montreal, Toronto, Calgary, Vancouver), May 29 - June 2
- Trade webinar with St. Moritz, June 1
- PROUD Experiences, Los Angeles, June 5 - 7
- TravelAge West Wave Awards celebration, Los Angeles, June 9
- LE Miami, June 12 - 15
- Trade webinar with VALAIS Matterhorn Region, June 15
- Signature webinar, June 23
- Trade webinar with Jungfrau Region, June 29

SCIB

- IMEX Frankfurt, May 23 - 25
- IRF Las Vegas, June 5 - 8
- CREATIVE Group Webinar, June 14
- MARITZ Webinar, June 15
- Switzerland Meeting Trophy and pre Tour, June 21 - 25
- SwissRead #2, June 27

KMM

- Accidently Wes Anderson production trip 31.05-8.06.2023
- Blum Podcast Event in Los Angels 1.06.2023
- Switzerland Travel Experience Canada (Montreal, Toronto, Calgary, Vancouver), May 29 - June

Future Activities

KAM

- GTM West, Henderson NV, July 11 - 13



- Trade webinar with Zurich Tourism, July 13
- Trade webinar with Glacier Express, July 27
- Trade webinar with partner TBD, August 10
- Virtuoso Travel Week, Las Vegas NV, August 12 - 18
- VIP Dinner in Vancouver, July 31st 23 for the national day, Vancouver
- Swisustainable Blue Print presentation for TO, July 20th Vancouver

SCIB

- GME Accor Event, Paris, July 17 -20
- LHW Educational Trip, Switzerland, August 24 -30

Campaigning & Activation

- Winter campaign digital and eOOH in selected cities, Aug-Nov
- Zurich campaign in SF, Sept/Oct
- Edelweiss/STŠ/Air Canada, 1st August B2C Activation Airport Vancouver, August 1st

KAM

- Euro Games LGBTQ Media trip in Bern,
- Science & Architecture in EPFL and CERN Science Gateway by Renzo Piano avant-premier group media trip for science and architecture media

Interesting observations

Booking patterns are back to old habits with pre-bookings of 8 months in advance, especially for the main summer season for the Americas.



1. Priority Markets

UK/IRELAND

Campaigning & Activation

MAY

Promotion of the Grand Train Tour incl. the promotion of the STP Promotion with the following activities:

- ST Touring magazine has been delivered with The Sunday Times to 145k subscribers and newsagents

- Native online article on the Telegraph featuring Roger x Trevor

- Programmatic advertisement promotion w/Sojern to push the STP Promotion

Native GTToS article promotion featuring each section with the Telegraph

Outdoor promotion with the media platform Sidetracked:

- Partners: BE, VD, VS

- Timing: April – Oct 2023

- High-end outdoor media platform

- Focus topics integrated;

- Trail running, gravel riding, kayaking, m-biking, paragliding, glacier hiking

- 100% Women/ Swisstainable (all-female talent crew)

Content Mix:

- Video, Print, Online (Live), Paid Social, Event

Content plan:

- Feature story & destination guide per partner

- short film

- Set of promotional social video teasers

- Organic & paid media promo & e-newsletter

JUNE

Promotion & launch of the Blum Podcast in English

- 27 June BLUM launch in Shoreditch

- 28 June Wallpaper promotion online & social for a month (hub and online articles, amplified via social media and e-newsletters)

STM Health edition in Engelberg



- We sent Kate Woolhouse, CEO of Hook - a private health club & health concierge in central London

Different content trips for Telegraph Promotions:

- UK celebrity Sally Philips exploring Gstaad & Adelboden
- Anton Mosimann exploring Grand Tour Deluxe with SDH

KAM

-12-13. June 2023: Destinations, ST participate over two days for one-to-one meetings with UK & Global Tour Operators

-14. June 2023: ST & Swiss Travel System participated in Listex Winter Luxury one-to-one meetings with Winter Tour Operators plus panel discussion on the future of AI and sustainability

-15 June 2023: ST, Swiss Travel System, Swiss International Air Lines, Lake Lucerne Navigation Company and Gornergrat Railway had a Swiss day at the Inghams office with group presentations for around 40 Inghams agents

-15 June 2023: ST Webinar with Ticino Turismo and Switzerland Travel Centre for 55 agents

-19-23 June 2023: Grand Alphorn Tour with 20 Swiss Partners visiting London, Birmingham, Manchester and Edinburgh showcasing the best of Switzerland to 170 trade guests

-19 June 2023: Travel Weekly and Switzerland hosted the first round table discussion on sustainability and how we can cooperate with each other in future. Speakers were from ST, Swiss International Air Lines, Avalon & Cosmos Waterways, Newmarket Travel, Travel Cooperation and Hotel Plan

-22 June 2023: Launch of Swiss autumn film after the Trade event with 25 trade guests and our Swiss Partners at the movie theatre of the Scotsman

-12-15 June 2023: Fam trip with 6 Trade guests to the Valais region discovering some hidden Gems like Brig and the culinary and wine offerings of the region

KMM

10-12 May: Media Group Trip to Vaud with 4 media reps

23-26 May: Media Group Trip to Ticino with 4 media reps

1 June: Regular exchange with PR agencies that represent Swiss clients/regions in the UK

5-7 June: Media Get Away in Leeds with 1:1 meetings/pitching and socialising

8-11 June: Media Group Trip to Zurich for Zurich Art Weekend with 4 media reps

14 June: Participation at Listex, media gathering for networking purposes

21 June: Launch event autumn campaign in Edinburgh with protagonists Jamie MacDonald and Julia Sutherland with media representatives

27 June: Launch event for the English version of the Blum podcast with media, content creators and guests



2. Active Markets

AUSTRALIA

Market Situation

The Australian economy experienced mixed performance in May and June 2023. GDP Growth: The Gross Domestic Product (GDP) exhibited moderate growth during this period, driven by robust domestic consumption and increased public and private investments. Employment: The labor market witnessed stability, with unemployment rates remaining relatively low. Inflation: Consumer price inflation remained within the Reserve Bank of Australia's target range, reflecting a relatively stable pricing environment. Trade and Exports: The export sector, particularly commodities such as iron ore and natural gas, continued to contribute significantly to the economy.

Campaigning & Activation

21 and 28 May: Snow Travel Expos Melbourne and Sydney

KAM

16 May: Virtuoso mag: ST and collette ad

15-19 May: Sales Calls Tour with Swiss partners

19 May. Snon'nSki Flight Centre Training

25 May. Skimax Training

31 May. Farewell Event Birgit & Livio

6 - 7 June: Virtuoso On Tour

KMM

15-19 May: Media events during Sales Calls Tour

23 May: Travel Daily product pages in co-operation with Collette Travel

23 May: Switzerland feature in KarryOn, in co-operation with Collette Travel

30 May: Media Swiss Summer E-Newsletter

11 - 17 June: Media Trip STS Sustainable by design

18 - 24 June: Media Trip 100% Women Cycling



2. Active Markets

AUSTRIA/HUNGARY

Market Situation

In Österreich herrscht immer noch eine deutlich höhere Inflationsrate als im Rest des €--Raumes. Entsprechende Zurückhaltung bei Einkäufen / Investitionen - tlw. auch Reisen. Wobei die Veranstalter bislang zufrieden sind mit den Vorausbuchungen; Kunden geben allerdings weniger Geld aus.

Primär werden - wie schon seit vielen Jahren - Meer-Destinationen (Kroatien, Italien, Griechenland) am stärksten gebucht. Gerade Panoramabahnen ziehen aber immer mehr Gäste an: etwas anderes erleben, dennoch nicht in die heissen, südlichen Destinationen fliegen - und zudem einfach auch den Bereich „Sicherheit“ positiv abhaken können.

Österreich selbst (d.h. Incoming Österreich) verzeichnet gute Buchungen - aber generell auch kürzer / günstiger: die Nächtigungszahlen vom Best-ever Jahr 2019 werden verschiedentlich erreicht - nicht aber die Umsatzzahlen.

Campaigning & Activation

- 1. Mai 2023: 2-seitige Pilatus-Schaltung im Reisen Magazin (82'000 Stück Auflage)
- 6. Mai 2023: Beilage des ST-Touring Magazins in den Salzburger Nachrichten (52'000 Stück Auflage)
- Mai /Juni 2023: Weekend Kampagnen Rausch & Basel:
 - 1) Mitte Mai 2023: Gewinnspielziehung und Planung der Gewinnerreisen
 - 2) 22.-25. Juni 2023: Umsetzung der Weekend-Gewinnerreise für die Rausch Kampagne samt Sponsored Story und Start Sidekampagne (weiterer Gewinnspielauftrag für Pflegesets von Rausch)
- 19. Mai 2023: „RF goes GTToS“-Inserat im HUB Magazin (10'000 Stück Auflage)
- Ende Mai/Anfang Juni: Falstaff Schweiz Special DACH im Umfang von 148 Seiten, Auflage von 80'000 Stück
- 1.-22.Juni 2023: Digitalkampagne „Sonner in Bern“ mittels Native-, Display und Social Ads zur Verlinkung auf marktspezifische Kampagnenmicrosite (5.4 Mio AIs)
- 20. Juni 2023: Bern-Advertoriaal im Belvedere Kunstmagazin (90'000 Stück Auflage)

KAM

- 09. Mai 2023 Kundenabend Sabtours mit Schweizer Partnern (STC, Pilatus und RhB)
- 23. Mai 2023: Eurofun Newsletter Integration zu 100% Women
- 30. Mai 2023 Top am Counter Special Auflage nur Schweiz
- 01. Juni 2023: Reisethek Social Media Posting zur Citykampagne



- 16. Juni 2023: STS-Advertorial in der touristischen Fachzeitschrift T.A.I.
- Juni 2023 Advertorials zu Pilatus News und STS Excellence Program mit österreichischen Travel Trade Medien TIP und Traveller

KMM

Presse e-Newsletter:

Im Mai und Juni 2023 wurden 2 Presse eNewsletters mit ST- und Partnernews an je 193 österr. JournalistInnen versendet.

Tourismuspresse.at-Aussendungen:

Im Mai und Juni 2023 wurden 3 Tourismuspresse.at-Aussendungen an je ca. 33'500 Kontakte versendet.

Medienreisen:

- 11.-14. Mai 2023: Gruppenmedienreise „Mittelland-Route mit dem Velo“ in Kooperation mit Eurotrek/Eurobike für 5 österreichische Journalisten
- 23.-25. Juni 2023: Gruppenmedienreise Genf für 6 österreichische Journalisten
- 3 weitere österreichische Medienvertreter auf ind. bzw. int. Medienreise in der Schweiz

Future Activities

- KAM Kooperation gemeinsam mit STS und STC: Raiffeisen Reisen, Retter Reisen
- Weekend Gewinnspielkampagnen mit Rausch und Basel - Nachbericht und Gewinnspielreise von Basel im Juli
- Corps Touristique Sommerevent für Trade- und Pressekontakte in Wien



2. Active Markets

BRAZIL

Market Situation

MAIN FACTS ABOUT MARKET BRAZIL

Recent figures for Brazilian's economy have been positive and above expectations. The first quarter's GDP was the most important one last disclosed by IBGE, with a growth of 1.9% in comparison with the immediately previous period. This result was essentially pulled by agribusiness, which got an increase of 21.6%.

At the same time, on the other hand, investments retracted 3.4% in the face of another 1.3% retraction in the last quarter of last year. It is a critical point of attention; this variable is crucial for solid and long-term economic growth. Nevertheless, the first part of the year was marked by many uncertainties about how would be the new government. Thus, it's natural to imagine investors' apprehension. Now, months later, there's already a more elevated degree of clarity about the economy's course, which should help the return of substantial financial injection of private resources in the country.

Another positive aspect that helps the Brazilian economy is that the American Central Bank kept interests in the range between 5% and 5.25%, ending an expansion cycle. In other words, the monetary tightening won't be less aggressive than it was thought, and the market reacted well, abroad, and here in Brazil. So much so that the Brazilian Real has advanced in an appreciation tendency, following many currencies across the world, and returning to thresholds near 4.80 reais per dollar.

And a cheaper dollar, although impairs the exportation perspective, especially regarding commodities, contributes – a lot – to the process of controlling inflation. In May, for example, the official price index in Brazil rose 0.23% and accumulated 3.94% in 12 months, according to IBGE's data. For a statistical matter, inflation should lower slightly more in June and increase once again in the second semester due to last year's comparison base, when there was a reduction in the tax on fuels that brought along three months of deflation, in the 3rd quarter.

With prices being less pressured and the future course of inflation converging towards the goal established by the National Monetary Council, there's an open road for the Central Bank to start in the short-term, a downturn cycle in the interest rate, currently at 13.75% a year. The attention is being directed towards the Monetary Policy Committee's meeting in August.

Monetary expansion, or interest reduction, is especially expected by the actual economy that suffers from elevated financial costs. The industry registered a 2.7% retraction in April and accumulated a 1% decrease in a four-month period.

The retailer commerce broadened its volume by 0.5% in the fourth month of the year but still accumulated a 3.1% increase within the year. The negative performance, or low growth, has been pulled by those sectors that depend on credit like the furniture (-7.7%) and house appliances (1.8%) sectors. On the other hand, basic sectors like supermarkets and drugstores continue to expand, at 3.1% and 3%, respectively.

From the service perspective, the sector took off from the economy's average, even because it was the sector that most suffered during the pandemic, in other words, it is what it's said: the first one to enter the crisis and the last one to leave. In April, the services' volume grew by 2.7%. When the segment is analyzed thoroughly, it draws attention to the 2.9% increase in services provided to families – meaning: tourism.

Indeed, Tourism has been an important highlight in the Brazilian economy. According to the monthly



survey by FecomercioSP, the activity's revenue in the entire country was R\$ 17.6 billion in April, a 9.8% annual increase, and accumulated a 15.6% gain within the year. It's worth the reservation that it isn't about profit, given it is just the revenue and not the financial result. It's notorious that operational expenses have pressured business owners' margins. However, this doesn't write off the fact that the tourism, leisure, and business sectors are coming back with full power in 2023.

Although there are many challenges on the way, which it's natural in Brazilian economic history, the mid-and long-term scenarios are promising. The reduction in interest will be a great incentive for economic activity in the country, and with milder inflation, it will create space for the expansion of investments and families' consumption.

CONFIDENCE INDEXES

The Consumer Confidence Index (ICC) retracted by 2.3% in May and returned to 122.2 points. This is the third consecutive drop; however, the current threshold is the highest one for the month since 2013. In comparison to April 2022, there was a 15.4% rise. There's a more favorable scenario in relation to employment and income in the capital of the state of São Paulo, which allows the discharge of overdue debts and a little extra amount left in the budget.

The Trade Entrepreneur Confidence Index (ICEC) pointed out 107.7 points in May, a decrease of 1.5% in the monthly counterbalance and of -8.3% in the annual comparison. Since the end of last year, the index has been following a descending course. And this is much more linked to the country's situation than related to the business itself. The economy is still growing slowly, and the high interest has brought a lot of concern to commerce, with a limited capacity for consumers to get credit.

TRAVEL AND TOURISM

The second half of the year is starting with optimism. The post-pandemic frenzy doesn't exist anymore, with a travel boom that caught suppliers still in a moment of restructuring, however, trips within Brazil are still increasing. Yet, this increase is happening with planning (even because of high costs, still existant), with more offers, and within normality that comes with new habits, new demands, and more flexi- bility, especially regarding leisure trips.

The second semester starts with more inter- national flights, like:

Belo Horizonte-Curaçao;

Belo Horizonte-Fort Lauderdale;

Belo Horizonte-Orlando;

Recife-Orlando – all offered by Azul.

And still:

São Paulo-Cairo, offered by Egypt Air

São Paulo-Los Angeles, by Latam (in partnership with Delta Air Lines)

Besides the flights that returned or were launched in the first semester, like São Paulo- Washington, by United Airlines, and São Paulo- Paris, operated by Azul.

Latam, the company with the most internation- al flights departing from Brazil, has announced more unprecedented connections for the upcom- ing months, aside from São Paulo-Los Angeles:

Foz do Iguaçu-Lima;

Belo Horizonte-Santiago;



Santiago-Melbourne;

Lima-Aruba;

Medellin-Miami;

and Lima-Atlanta.

In parallel, Azul has announced full focus on two fronts: equate the flights departing from Brazil to Europe with the number of flights from Brazil to the United States and increase the number of flights in partnership with JetBlue and United departing from Orlando and Fort Lauderdale, and therefore reach more American destinations. In relation to Europe, this same partnership exists with Tap Air Portugal, which has its flights for sale on Azul's website.

Azul, which is already the national Airline with the most destinations in its air network within Brazil, is willing to establish a more solid international air network.

Nonetheless, the international flight offers in Brazil haven't reached the 2019's indexes yet, which explains in part the increase in fares. The indicators for international demand and offer of Brazilian companies didn't surpass, in May, the indexes from May 2019, varying negatively at 12.1% and 9.5%, respectively.

The number of passengers transported abroad by Brazilian Airlines was 1.6 million, which represents 86.1% of the transactions from May 2019.

VISAS

In the market, the expectation for the beginning of the paid online and mandatory visa to Europe is high (Great Britain should be the first country to adopt the new practice); and for the reduction of lines and the waiting period in the American consulate – a new visa is still taking a year to be booked. The American consulates in Brazil started operating on Saturdays and hired more employees to solve the issue.

A NEW CVC

The largest travel operator in Brazil, CVC Corp has a new structure, but counting on old acquaintances. The company is going through a restructuring of its executives and shareholders, and it's bringing back experienced professionals with whom they have already worked and know the operator, like the CEO Fábio Godinho, the franchising director, Emerson Belan, the IT director, Paulo Palaia, among several other managers and coordinators. We can expect a more aggressive, more active CVC and a company that is closer to the partners in the second semester.

A NEW AZUL VIAGENS

At the same time, the competitor Azul Viagens, which already has 50 stores in the country (compared to 1.2 thousand of CVC), has already announced their plan to double this number by the end of the year, reaching 103 physical stores.

MORE OPERATORS

In the IPW 2023, the Brazilian operators Agaxtur, Abreitur, CVC Corp, Diversa, and Orinter were awarded. They were the companies that most sold "the United States" last year and that have projects for the promotion of this destination in the second semester. Orinter, for example, will have the "United States Connection" (Conexão Estados Unidos) in August, in Rio de Janeiro. Diversa will hold a FAM tour to the USA with an awarded itinerary in September. Both events count on Brand USA's support.

The event "Visit USA 2023" will take place on August 7th in São Paulo, and on the 9th in Campinas.



The event is held by the US Commercial Service in Brazil.

EVENTS IN THE SECOND SEMESTER:

PANROTAS Next Goiânia – August 1st

PANROTAS Next Ribeirão Preto – August 3rd

Avirrp – Ribeirão Preto – August 4th and 5th

PANROTAS Next Porto Alegre – August 8th

PANROTAS Next Curitiba – August 10th

Abav Expo 2023 – Rio de Janeiro – September 27th to 29th

BTM – Fortaleza – October 19th and 20th

100X Brazil – São Paulo – October

Festuris – Gramado – November 9th to 12th

Campaigning & Activation

- **Mondial da Fondue:** Fondue Festival in São Paulo. The winner will represent Brazil at the Mondial da Fondue in Switzerland.

8 candidates and 9 jurors. 30 guests: opinion makers and journalists.

The event was sponsored by: SWISS; Cheese Association in Brazil

- **STP Digital Campaign:** Between, Apr 15th to May, 15th. Meta and Google Ad's campaign

- **STP: Advertorial at Panrotas Magazine**

- **SWISS Digital Newsletter:** SWISS Newsletter including a Switzerland Tourism content.

- **Destination Wedding Constance Zahn May and June:** Banner online on Constance Zahn website.

- **Capital Club & Julio Okubo: Presentations by market manager to a select group of HNWIs from Rio.**

- **Raclette with Forbes Brazil:** -Get together traditional Swiss raclette dinner organized for Forbes Brazil.

- **Dinner with VIP Guests:** Dinner offered by ST to 11 women from Agrobusiness region in visit to São Paulo city.

- **Digital Campaign: Summer Season in Zurich.** Meta Campaign to promote Zurich during the summer

KAM

KAM/Digital Newsletter: GTToS & STS



Highlight: GTToS and STS dedicated newsletter. **02nd mailing:** May 03rd. **Mailing:** 26.500 mails for travel agents, 160 mails for corporate travel managers, 1.800 WhatsApp messages to TAs, **Opening rate:** 24,36% **Link newsletter:** <http://smtp.mailnewsdobrasil.com.br/email/SUICA-04-DE-24-2023/suica-04-de-24-2023.html> Key partners highlighted in the content GTToS, STS.

KAM: Travel Luxury Magazine by Primetour - 2nd edition

03 May 2023: Breakfast event at Nara Roesler Art Gallery. ST Brazil attended the launch event of the new edition of the Travel Luxury Magazine by Primetour published in partnership with the biggest trade media publication Panrotas. Double page editorial focused on gastronomy (Media result reported in Feb 2023). Switzerland Tourism team presence: Mara Pessoa, Trade Manager.

KAM: St Moritz & TTW Group Happy Hour.

03 May 2023: Get together happy hour organized by TTW Group & St Moritz Tourism and their representative in Brazil, Experanto Latin America. Audience: Ski Brasil experts & TTW Lab agencies. Swiss partners in attendance: St Moritz Tourism; Switzerland Tourism team presence: Fabien Clerc, Market Director; Mara Pessoa, Trade Manager.

KAM: 2023 Pre-ILTM Latin America – The Living Circle dinner.

07 May 2023: Get together dinner organized by The Living Circle with 8 Key Brazilian accounts. Swiss partners in attendance: Helen Wörner, The Living Circle; Fernanda Maldonado & Jean-Bruno, Experanto Latin America. Switzerland Tourism team presence: Mara Pessoa, Trade Manager.

KAM: 2023 Pre-ILTM Latin America - TTW Group Warm up dinner.

08 May 2023: Get together dinner organized by The Living Circle with suppliers. 7 Swiss partners in attendance: The Living Circle; Kulm St Moritz & Grand Hotel Kronenhof Pontresina; Badrutt's Palace; St Moritz Tourism; Burgenstock; Guarda Golf; Six Senses Crans Montana; and more. Switzerland Tourism team presence: Fabien Clerc, Market Director; Mara Pessoa, Trade Manager.

KAM: 2023 Pre-ILTM Latin America Swiss Delegation Lunch by Reed Exhibition team

09 May 2023: Get together lunch to welcome the largest Swiss delegation to ILTM Latam organized by Reed Exhibition team. 8 Key Brazilian accounts invited to attend the exclusive networking lunch. 17 Swiss partners in attendance. Switzerland Tourism team presence: Fabien Clerc, Market Director; Mara Pessoa, Trade Manager; Natalia Leal, Marketing Manager.

KAM: ILTM Latin America 2023.

09 – 12 May 2023: Swisustainable booth decoration. Distribution of 2023 Sales Manual. 400 buyers in attendance over 3 b2b workshop days. 11 tables, 20 Swiss partners + 2 Swiss hotels exhibiting as part of Hotel chain brands. Switzerland Tourism team presence: Fabien Clerc, Market Director; Mara Pessoa, Trade Manager; Natalia Leal, Marketing Manager.

KAM: 2023 ILTM Latin America – Teresa Perez Lunch.

12 May 2023: Get together lunch organized by Teresa Perez Tours with 100 suppliers at Thomas Perez residence. Many Swiss partners in attendance. Switzerland Tourism team presence: Fabien Clerc, Market Director; Mara Pessoa, Trade Manager.

KAM/Digital Newsletter: Geneva. Highlight: Geneva dedicated newsletter. **02nd mailing:** June 01st and 15th. **Mailing:** 26.500 mails for travel agents; 160 mails for corporate travel managers; 1.800 WhatsApp messages to TAs; **Opening rate:** 25%. **Newsletter link:** <http://smtp.mailnewsdobrasil.com.br/email/SUICA-06-DE-24-2023/suica-06-de-24-2023.html>

Key partners highlighted in the content: Geneva Tourism.



KAM/Digital Luxury Newsletter: The Woodward Geneva. Highlight: The Woodward dedicated luxury newsletter. **Mailing:** June 09th and 28th. **Mailing:** 700 mails for luxury travel agents. **Opening rate:** 58.63% **Newsletter link:**

<http://smtp.mailnewsdobrasil.com.br/email/SUICA-08-DE-24-2023/suica-08-de-24-2023.html>

Key partners highlighted in the content: The Woodward Geneva.

KAM: Switzerland Travel Mart (STMH) - Health edition 2023. 25-30 June 2023. Kempinski Palace Engelberg. 03 buyers from Brazil: Vera Moller, Teresa Perez Tours (Luxury travel trade); Nadime Alves, Credit Suisse (Family office); Dr. Joao Daher, Cosalud (Medicine/ Doctor). 14 Swiss health suppliers. One-to-one appointment and networking opportunities for the brazilian buyers to meet swiss tourism partners within health tourism segment. Post convention tours: Preventive medicine program (2 buyers) and Acute medicine program (1 buyer).

KMM

- **Press release ILTM Latin América:** Press release highlighting the Switzerland Tourism presence and the largest Swiss delegation.

Mailing: 600 journalists

- **Meetings with journalists at ILTM Latin América:** Meeting with approximately 15 journalists in the ILTM press room.

- **Media Trip Zurich Art Weekend & Lucerna.**

Versatile Magazine. Printed version: 20K copies. Online version: 594K Page views per month

- **Media Trip Health Tourism Jornal de Brasília:** Brasilia's newspaper (the main newspaper of the Brazilian capital). Printed version: 23K copies per day.

Online version: 12MIO Page views per month.

- **Media Trip Swisustainable by Design Jornal de Brasília:** Brasilia's newspaper (the main newspaper of the Brazilian capital). Printed version: 23K copies per day. Online version: 12MIO Page views per month.

- **Media Trip Women Cycling @raqueliendrick:** Brazilian digital influencer representing Brazil at the Women Cycling Media Trip @raqueliendrick 34k followers

- **Media Trip Lucerna & Zermatt @gabrielgotijo**

- **Press Release: Summer:** Press release highlighting the Summer season.

Mailing: 600 journalists

Future Activities

KAM: Sales Calls POA, 6-7 July 2023

KAM: FVO Summer Famtrip, 25 Aug-03 Sep, 2023

KMM: Tv media trip AUG



2. Active Markets

INDIA

Market Situation

The latest statistics on overnight stays show values that might be disappointing at first glance, but a broader analysis of the current situation is essential and to consider, along with these figures, other market indicators and sentiments.

For the statistics in April the number of overnight stays was 45'300, while arrivals were 19'848. In percentage terms, compared to the reference year 2019, the decrease is 28,5% (ONs) and 33,3% (arrivals), respectively. In May, the decrease was 37,1% for overnight stays and 37,9% for arrivals. The January-May trend is as follows for arrivals: 92'017 arrivals (-31,5%) and 214'129 overnight stays (-29,1%).

This is where the first argument comes in: overnight stays in apartments. India has always been a market with a high percentage of tourists staying in apartments. Even before the pandemic, statistics indicated that about 35-40% of Indian tourists stay in apartments. From the most important TOs in India we are getting clear signals that this percentage is increasing: partly because of the shortage of hotels in Switzerland, especially in the 'must-visit' destinations for our market (Interlaken and Lucerne) and, where available, the very high prices (India is a very price-sensitive market). Hence the leaning towards apartments, which are offered in the catalogue by many of the major Indian TOs or book them on the increasingly popular also in India. Airbnb.

Another extremely relevant indicator is the number of visas issued by our embassy in Delhi. The number of visas issued in these first five months is almost identical to the number of visas issued in 2019. This shows us on how our destination is always in demand. The critical situation of the embassies of the other Schengen countries remains. Since reopening to date, our Embassy is the one issuing the highest number of visas (at the same pre-pandemic levels). Honestly, a percentage, which we consider to be quite minimal, goes into visa shopping (i.e., tourists, once they have obtained a visa from Switzerland, cancel their original itinerary to opt for other European countries, perhaps precisely because the other embassies have not been able to issue visas).

Other factor: the statistics of the products sold by Swiss Travel System. Here we are talking about customers who are actually in Switzerland. STS records, compared to 2019, an increase in sales of 23%.

Certainly the month of May saw the cancellation of some groups, who were unable to obtain their visas in time. Although the trend is to apply for visas earlier and earlier, India remains a very last minute market. In circumstances like the present, of zero or little cooperation from other countries, the pressure on our visa section is still strong, and it is not always possible to fulfil last minute requests from tour operators who operate mainly groups. May remains the month with the highest number of tourists, and the pressure has been particularly strong. But in general from all TOs, both those with national coverage and the smaller ones, there are positive messages about sales of mono-Swiss packages or with Switzerland as the main destination. Precisely with indications of an increase in flat sales, which makes it necessary to interpret the statistics available to us on overnight stays in hotels.

The much anticipated and feared TCS tax that would have caused prices for holidays outside the country to rise from 6 to 20 per cent (the increase was scheduled for 1 July) has now been postponed to a date to be determined. This constitutes an easing of the pressure that TOs feared for this year.

Campaigning & Activation



Roger Federer and GTToS Campaign

-We amplified the launch of the global campaign with Roger Federer and Trevor Noah by executing an OOH campaign in Mumbai city as well as Delhi and Mumbai airport, print advertisements and advertorials in leading Indian newspapers and advertisements in leading lifestyle and travel magazines as well as a digitally driven campaign across platforms like Inshorts, PhonePe, Instagram and Facebook. The campaign ran from 01st April – 14th May 2023

Total Contacts/ Impressions:

OOH campaign Mumbai City - 19"594"465

OOH campaign Mumbai and Delhi airport - 2'610'000

Digital campaign - 17'999'769 impressions

STS Promotion campaign

- We did a follow up campaign for STS including the promom which also included an independent regional SEA/ SEM campaign to target the STS Promo towards key consumers and audiences in the India market. The campaign ran from 15th Apr to 14th May 2023.

Total Contacts/ Impressions:

Digital campaign including paid social media: 39'855'104

SEA campaign : 27'649'587

KAM

KAM:

- 23rd May 2023: Sales Calls with SantaMonica Travels in Kochi during STE Recce, to get an understanding about the business and the season

- 7th June 2023: Networking event for Key Accounts at the Consul General's Residence in Mumbai to welcome Simon Bosshart and Sara Roloff to India. "Swisstainable" as well as the future of tourism was presented. Total No. of Attendees = 48

14th - 16th June 2023: Sales Calls in Delhi with TOs / TAs / Wholesalers. Mix of GIT, OTA, FIT & Luxury. Agencies Met: MMT, TBO, DPauls, The Intrepid Club, Utazzo, Maurya Travels, Dewan Holidays, Kuoni, Eurocursions & Quixotic Vacations Pvt. Ltd.

- 28th - 29th June: Sales Calls in Mumbai with various Key TOs / TAs / Wholesalers (FIT / GIT / Luxury). Agencies Met: Jain & Jain Travels, KFT Corporation, Ottila International, TBO, Vibrant Experiences, Ahura Explorience)

SCIB:

- Pre tour IMEX to Geneva & Zurich from 17th to 22nd May 2023. 10 IMEX hosted buyers participated in the pre tour. Participation at the SCIB booth at IMEX in Frankfurt from 23rd to 26th May 2023.

- Optimice event in Mumbai on 1st June 2023. One to one meetings with corporate clients

- Travel Wedding show in Udaipur on 24th & 2th June 2023. One to one meetings with Wedding Planners.



KMM

Influencer Trip for Interlaken

-We organized an influencer/ content creator meet in May 2023 for some of the most popular Indian travel, food and lifestyle influencers, which include Anunay Sood, Brinda Sharma, Shivesh Bhatia, Ashi Khanna and Saloni Kukreja. We curated itineraries that highlighted Zermatt, Zurich, Lugano, Geneva and Interlaken, that were showcased across the Instagram and YouTube pages.

Total Reach: 31'477'000

Total Likes: 2'646'382

International Media Trips

-We participated in the following international media trips by nominating prominent freelance travel writers to represent the India market:

- ♣ The Magic of Beautiful Places
- ♣ Summer in the Cities
- ♣ STS: Sustainable by Design

Future Activities

KAM:

- Sales Calls with various TOs / TAs / Wholesalers (GIT / GIT / Luxury) in Mumbai
- Training for TBO Mumbai Sales Team on 21st Jul 2023
- Sales Calls in Hyderabad and Chennai (8th - 11th Aug 2023)
- Zurich Tourism in India (17th - 26th Aug 2023) : Sales Calls & Trainings in Mumbai and Delhi
- Interlaken Tourism Webinar on 17th Aug 2023

MICE:

- Attendance at WOW event in Mumbai on 13th & 14th July 2023
- Sales call to MICE agencies and corporate clients in Ahmedabad. 19th to 21st July 2023
- Sales call in Kolkata - last week of July /1st week of August 2023
- Zurich Tourism sales activity week in India. 18th Aug 2023, sales call /presentation to MICE agencies in Mumbai

KMM:

- Lending support for the filming and production of a short film, 'Tara and Akash: Love beyond Realms' and is expected to be broadcasted on OTT platforms like Disney+ Hotstar.
- Collaboration with SWISS to host Sejal Kumar, a prominent lifestyle influencer, on a FAM trip at the Montreux Jazz Festival in July 2023.
- Influencer trip with Lindt Home of Chocolate

Campaign and Activation:

- Supporting the shoot of OTT show Driving with the Legends
- Shoot with Neeraj Chopra for Zurich
- Shoot with influencers/actors for STS and GTToS
- Digital campaign for autumn promotion with STS



2. Active Markets

JAPAN

Market Situation

Japan's outbound tourism has recovered by 40% until June. Switzerland's recovery rate is still above average and agents confirm that it's the best selling destination. Meanwhile mask wearing in Japan has declined drastically with the arrival of the hot summer months. Travel agents are concerned about capacities for summer 2024.

Campaigning & Activation

- Instagram contest campaign from 20 March - 30 April to grow followers with prize competition by integrating all digital partners. 44% fan base growth and total 90'492 impressions.
- Content creator trip of Millennial influencer. Campaign will be launched in September.
- BAseL event for VIP Art lovers. Event with art specialist Mika Lee and young artist Yuka Numata for 16 high profile clients.
- UBS VIP client event where ST presented Swisstainable.
- Art ambassador trip: Millennial Artist Yuka Numata travelled to Basel for Art Basel to create content.

GTToS Display and Meta campaign: Two-phased online display and meta ads campaign. 15.4.-25.06.2023. 1st wave pushed the Swiss Travel Pass promotion using the RF visuals. 2nd wave pushed the GTToS using the general GTToS visuals. Campaign reached 2.8mio impressions and 11'872 qualified reactions.

KAM

- STE in Osaka and Tokyo with over 100 agents and 16 partners participating.

KMM

Media Trip

- Ota campaign x 25ans media trip, one of the main campaigns of ST Japan and realised photo shootings in Zurich, Jungfrau Region, Ticino and Grand Train Tour of Switzerland routes (Gotthard Panorama Express and Luzern-Interlaken Express)
- Intl media trip '100% Women Cycling' participated by a cycling influencer from Japan.

Media Result

Magazine:

- 'Best Flower Arrangement', flower magazine to introduce spring flower arrangements in Basel,



Lausanne, Interlaken and Zermatt.

- 'ELLE' magazine to introduce Hôtel des Horlogers of Audemars Piguet in Vaud Region.
- 'Nodule' travel magazine to introduce Mt. Niesen and superview in the region.
- 'Co-Trip' travel magazine to introduce 'Meet the Sheep' in Zermatt

Online:

- 'Cyclowired' the cycling media report about Alpine Pass road biking experience in Vaud Region, as the result of cycling fam. trip in 2022.
- 'Gold and the Experts' the golf online magazine introduces the favorite destination of the Kabuki actor Yajuro Bando who is the Swiss lover.

Guidebook:

- Globetrotter Swiss Travel Guidebook, freshly published for the first time in 3 years after the pandemic.
- RURUBU Swiss Travel Guidebook, freshly published for the first time in 4 years after the pandemic.

Future Activities

- Travel Seminar for 'Life Partners', wealthy membership organization to promote luxury travel at the residence of Swiss Ambassador.
- JATA destination seminar.
- Fam & media trip in Jungfrau Region.
- BS Fuji TV media trip in Jungfrau Region.
- KAM event
- City campaign

Interesting observations

The luxury and millennial markets are recovering the quickest in Japan.



2. Active Markets

KOREA

Market Situation

[Economy]

The consumer price index (CPI) in June 2023 remained unchanged at 111.12 from the previous month, according to the Korea National Statistical Office. The CPI rose 2.7% from a year earlier, down 0.6 percentage from the previous month. This is the first time in 21 months that the inflation rate has fallen below 2%.

Specifically, the CPI excluding agricultural products and petroleum products rose 0.2% in June from a month earlier and 4.1% from a year earlier. The CPI excluding food and energy rose 0.1% in June from a month earlier and 3.5% from a year earlier.

The living expenses index remained unchanged in June from a month earlier, but rose 2.3% from a year earlier. The fresh food index, which determines the price of meals, fell 0.9% in June from a month earlier but rose 3.7% from a year earlier.

[Tourism]

It is expected that the overseas travel will return to 2019 levels by the end of 2023, with a noticeable trend of longer vacation durations. The positive performance in the first quarter has motivated the Korean major KAs to secure a strong position in the market, anticipating a further increase in demand for international travel in the second half of the year. Due to the high cost of flights and accommodation during the peak season, it seems the actual sales of June & July didn't meet the high expectation of KAs. However, the bookings in Autumn season is positively promising.

Campaigning & Activation

SoMe: Swiss Spring Street Festival Partners' Week Event.

- Period: Apr. 8th - May 8th
- Upload photos taken with the partner zone using designated hashtags
- Distribute customised T-shirt at the event site as a reward

Results:

- Generate at least 100 postings for each partners with #InLOVEwithSwitzerland
- 1st week: Valais (#valaiswallis_kr)
- 2nd week: Zurich (#visitzurich)
- 3rd week: Luzern (#MyLucerne)
- 4th week: Schilthorn (#schilthorn)
- 5th week: STS (#swisstravelsystem)



KAM

Swiss Travel Academy

- 3rd Seminar of STA

- Date: May 25th, 2023

- Venue: Swiss Embassy in Seoul

- Participants: 14 KAs of 17th STA participating members

- Program

Destination LLR Trade Presentation

Lucerne city and Mt. Pilatus ppt by ST

Local Rep. Presentations :

Mt. Rigi and Lucerne Lake Navigation by Jay Maeng

Mt. Tiltis by SeA Park

- 4th Seminar of STA

- Date: June 8th, 2023

- Venue: Swiss Embassy in Seoul

- Participants: 15 KAs of 17th STA participating members

- Program

Destination Valais and Zermatt Presentation

Zermatt ppt by ST

Local Rep. Presentations :

Valais region by Gabriel Han

KMM

Media Trip with Celebrities (Hyori Lee, Sangsoon Lee and Hongchul Ro)

- Hyori Lee, who is a highly influential Korean singer, record producer, activist and television presenter, visits Switzerland for Art Basel with her husband, Sangsoon Lee, who is also a well-known musician in Korea.

- To promote LLR / Jungfrau Region and Art Basel by generating media coverages and buzz on SoMe channels through celebrity's & ST owned Instagram postings



- Period: June 8 - 15
- Destinations: Zurich, LLR, Rigi, Jungfraubahnen, Interlaken, Basel
- Media Exposure:
- 155 articles / 103,785,750 contacts
- Digital Exposure:

IG @lee_hyolee: 71.3K

- 10 postings / 10 Stories / 1,196,000 likes / 6,151 comments

Media Trip with Magazine "Travie"

- Period: June 18-25
- Theme: 100% Women Cycling
- Destinations: St. Moritz, Ticino, Grottro, Locarno, Gstaad and Zermatt
- Expect to have coverage on Sept. edition of Travie

Media Newspapers to 700 journalists in May & June respectively

Future Activities

Influencer Trip

- Period: July 3 - 13
- 2-3 influencers visit Switzerland to boost up the travel needs of KR audiences and generate creative travel contents

Being Swisstainable - longstays in Zurich with Korean Influencers

- Period: July 15 - Aug 3
- Communicate Swisstainable through influencers during long stays in Zurich
- During thier stay they will post of thier life in Zurich and Switzerland with the story of swisstainble
- they also will arrange meet ups with Korean travelers for exploring switzerland suggesting Swisstabinable ways of traveling.



2. Active Markets

NORDICS

Market Situation

Denmark

Employment, GDP and private consumption are doing better than expected, but much of the economy is

in a slump. Consumption and the housing market are being supported by the decline in energy prices, but a more broad-based fall in inflation is needed.

Finland

Finland's economic growth will stagnate in 2023. Inflation remains high and rising interest rates are holding back the economy with lagged effects. Flow of export orders remains sluggish in the short term. Economic growth should pick up in 2024 as a result of private consumption supported by falling inflation, lower interest rates and the reinvigoration of export demand.

Norway

Growth in the Norwegian economy has dropped off, but activity levels remain high. Unemployment is rising slightly but still low. Inflation has been higher than expected and wage growth will be around 5.3% this year. NOK-deprecieringen kommer att påverka inflationen och gör att vi nu förväntar oss att Norges Bank höjer styrräntan i augusti.

Sweden

The Swedish economy has exceeded expectations, and we no longer anticipate a recession this year. As a result, we have significantly revised the outlook for 2023 and now predict a period of modest yet positive growth. Despite high inflation, we believe the peak has passed and expect the 2% target to be reached earlier than in the Eurozone, particularly due to the comparatively lower wage agreement.

Campaigning & Activation

TikTok, partner campaign, Ticino

Campaign period: 24/5-26/6

-Meta ad campaign, Recovery, Roger Federer

Campaign period: May-June

The first push was an awareness campaign optimized for ad recall.

The second push was a traffic campaign, optimized for link clicks.

KAM

TRADE



Fam Trips / Site Inspections

NO - 21-276 - Fam Golf Alpespsesialisten, 1 pax

21-22 - Verbier

22-24 - Crans-Montana

24-25 - Villars-sur-Ollon

25-27 - Gstaad

Newsletters

Ticino

Recipients: 475

Opened:: 30,6%

Click: 3.9%

Valais

Recipients: 454

Opened:: 42.6 Opened

Click: 3.1%

KMM

Press trips:

SE - Johan Ståhberg Ticino

DK - Sebastian Himmelstrup Valais

SE + DK - Caroline Strömberg + Laura Petri 100% women bike trip

NO - Andreas Grøgaard Engelberg



2. Active Markets

POLAND

Market Situation

Politics:

The EU criticized Poland's lack of progress on judicial reforms, adding fuel to the already fiery relationship between Warsaw and Brussels. The European Commission raised "serious concerns" about the independence of the Polish judiciary in its annual report on the rule of law, noting that the country ignored most of the EU's recommendations from the previous year. With less than six months to go until Poland's tightly contested elections, where the nationalist government risks losing power after eight years in office, the report will shed a harsh spotlight on the tensions between Warsaw and Brussels under the ruling Law and Justice party.

Economy

In the first quarter of 2023 the Polish GDP fell by 0,3% y/y and grew by 3,8% compared to the fourth quarter of 2022. These official numbers, announced in late May, were slightly below previous estimates. For the whole year, the EU commission foresees a slight 0,4% GDP growth, followed by 2,5% for the next year. Meanwhile, inflation stood at 11,5% y/y in June, after 13% in May. The Polish National Bank does not intend to raise interest rates any further to curb inflation, counting on a continued cooling of inflation in the coming months. The National Bank even announced a possible lowering of the interest rates later in the year.

Average wages rose by 12,2% y/y in May, almost covering inflation after over a year of wage losses, when adjusted for inflation. Unemployment stood at 5,1% y/y in May. Low unemployment and the lack of qualified workers in many sectors are leading to a nationwide debate about the need of potentially hundreds of thousands of immigrants per year to fill the vacancies.

Campaigning & Activation

- Supplement in Gazeta Wyborcza, GTToS, 19th May - Friday edition

120'000 copies, Train to nature. Summer and Autumn in Switzerland

Focus on sustainable travel, train inspiration. Content from our market partners

- Articles from our print supplement in Gazeta Wyborcza published online. Topics: Swisstainable and train rides. Reach 36'800, views 68'230
- Contest with women's magazine *Wysokie Obcasy*, section "women on the road", One month challenge. Prize: Grand Train Tour of Switzerland trip in September. Contest promoted online and in print. Over 490 participants.

Self-promotion *Wyborcza.pl* and *Wysokieobcasy.pl*. Online, SoMe. Reach 720'000

- Content in Magazine *Książki*, Article about train rides in Switzerland. One page advertisement in bimonthly magazine *Książki* with Roger Federer on Grand Train Tour, including QR code with link to YouTube movie. 14'500 copies with reach 45'000

- Exhibition on the fence of Swiss Embassy- Prominent location in Warsaw, 17 panels with focus on Grand Train Tour, 1 panel with map and panoramic trains, 1 panel with focus on



Swisstainable, 2 panels for each panoramic train, QR codes to our eGuide GTToS. Timing: from May till end of September

- Advertorial and insert in Businessman Traveler, 2 pages, bimonthly edition June-July. Topics: summer, GToS, GTToS, cities. QR codes to our guides online ST maps insert. 20'000 copies, 300'000 reach. Supported by online activities. SoMe activities, reach 52'000

- Advertorial and insert in Zwierciadlo, 1 page advertorial in monthly magazine. One of the biggest women's magazines. QR codes to our e-guides

ST summer GTToS map insert. 120'000 copies, 620'000 reach

- wyborcza.pl, branding 100% Switzerland, 10-11 June. Topic: summer on Grand Tour of Switzerland. Reach: 2'890'000, 6'900 clicks

' Article on wysokieobcasy.pl Online article with focus on interesting and surprising facts about Switzerland. Article shared in daily *Gazeta Wyborcza* (leading newspaper) newsletter with 248'000 recipients and with 28'327 recipients of women's magazine *Wysokie Obcasy* Article promoted in SoMe of *wysokieobcasy.pl*

▪ Activiteis after Media trip GTToS organised in May with Agora – publishing house: print, online, radio, SoMe (*Wyborcza.pl, Złote Przeboje, Wysokie Obcasy*) Publications after return – posts in Social Media (mainly Instagram) and stories. Reel with reach 27'000. Reach 460'000

▪ ST online campaign Summer. Display on main portals (*onet, wp, interia, gazeta*), 1'608'000 views. Native placed in prominent spots.

Views 3'535'000. Total views of native and display around 5'150'000

SEM with 7'570 views, CTR 20,68%

Commercial break reach 1'508'000

Media reach 315'000

Video with 427'000 views

Mailing 328'000 impressions

MMS, 34'000 recipients

▪ Facebook Weeks for partners: organic posts published every day. Inspiration and ideas for active time and attractions in the region.

- Engelberg Titilis week, reach around 51'000

- Pilatus week, reach around 64'000

- Aletsch Arena week, reach around 54'000

- Schilthorn week, reach around 73'000

- Zermatt week, reach around 110'000

- RhB weekn, reach around 82'000

▪ May - ST paid posts: biking inspirations – 100% women, Grand Tour of Switzerland , NG Traveler - Swiss Edition. Reach around 350'000

▪ June - ST regular paid posts with focus on summer, cities, our guides



Topics 100% women pictures and videos, GToS, GToS, summer outdoor and cities, Swisustainable.
Reach so far 1'200'000

- May ' regular stories on ST Facebook. Different topics, stories for partners Interaction with viewers. RhB/Engelberg Titlis/Pilatus integrated. Avg. weekly reach around 9'00.

- June. Regular stories on ST Facebook. Different topics, stories for partners. Interaction with viewers. Zermatt/Schilthorn/Engelberg. Summer in Switzerland, outdoor. Avg. weekly reach around 9'000

KAM

- SWISS meetings in Warsaw 4 SWISS representatives visiting Warsaw. Meeting at the Swiss Embassy and Chamber of Commerce

Business lunch with 6 KAM and ST. Discussion and exchange regarding possible new SWISS connections from Poland, sharing of market insights

- Invitation for STM in Geneva

KMM

Media Trips:

- individual media trip, onet.pl, 17 – 21 May, Grand Train Tour of Switzerland and outdoor activities, Lucerne, Interlaken, Zermatt,

Content for publication in special service on *onet.pl* – Swisustainable travel

Recovery project

- individual media trip, NGTraveler, 19 – 22 May, Grand Train Tour of Switzerland, Interlaken, Montreux, Lucerne, GoldenPass, also Belle Epoque

SoMe creations on spot, content for eGuide GToS experiences

SoMe reach 170'000, Content for our updated e-guide GToS

- Individual media trip, Newsweek, 29 – 31 May, Grand Train Tour of Switzerland, focus on BEX, Chur, Davos Klosters, historic train

Bernina Express experience. Content for publication in special service on *newsweek.pl* and for a special for BEX in August

- Int. media trip, Cities, 21 - 26 May, Little hidden pearls

SoMe (Instagram and Facebook) on spot, stories, posts

Content for our ebook "Cities" to be published

Blogger "*W poszukiwaniu świata*"

- Group media trip, Agora publishing house (leaders in print, online & radio). Print, SoMe, radio, www, 24 – 28 May, 6 pax



+ 2 extra days for 2 journalists, Grand Train Tour: Lucerne, Lugano, Pilatus, Davos, GOPEX, BEX, Voralpen Express. Content for publications on *wyborcza.pl*, *zlotoprzeboje.pl* and *wysokieobcasy.pl*

- Group media trip Peak to Peak, 13 – 17 June, 5 journalists representing magazines, portals and freelance. Program including Schilthorn, Pilatus, Titlis and Harder Kulm. Focus on cable cars and cogwheel trains

SoMe during the trips, reach 132'000

- Artists on GTToS, 3 different 4-day trips between 4-11 June

3 musicians on GTToS, 6 pax. panoramic train rides. SoMe during and after the trip, reach 470'000. Content for video to be presented at 2 summer music festivals

- Photo project, Magic mountains, 24-29 June, 5 pax, 3 photographers and 2 contest winners. Visit to Schilthorn, Aletsch Arena and Zermatt. Focus on landscape photography. Publications during the trip in SoMe (Instagram, InstaStories), results will follow

- Int. media trip, 100% women, 19-24 June. Part of the project 100% women cycling. 1 pax from Poland, Maja @sugarwoman. Posts and SoMe communication during and after the trip. SoMe reach 370'000

- Int. media trip Cities, 25-30 June, Swiss Cities and water. 1 pax from Poland, Gaweł @gawe_l Posts and SoMe communication during and after the trip, reels. SoMe reach 132'000

Future Activities

- Group media trip biking women, with former World champion and Olympic silver medalist (2x) Maja Włoszczowska, August

- Promo of eGuide GToS, relaunch

- Promo of eGuide cities, relaunch

- Promo of eGuide GTToS with NGTraveler

- TVN trip, September

- *Edyta and Friends* trip, September

- STM Geneva, September

- Contest winner trip, September

- Autumn promotion in SoMe

- Influencer and media personalities trips: Marcin & Ada, Kamila Kalinczak, Aleksandra Kwasniewska & Marta Wierzbicka



2. Active Markets

SOUTH EAST ASIA

Market Situation

LX has adjusted its flight frequency from daily to 6x weekly from SIN and BKK to Zurich, reducing seat capacity for the Summer season.

Thailand election in May resulted in oppositions winning majority votes. Political uncertainty still remains with the installation of new PM which may temporarily dampen willingness to travel.

Best practice competitors

JPY continues to weaken against USD, making travel to Japan relatively more affordable.

New airlines e.g. Zip Air and Starlux have emerged post-pandemic, adding more flight capacity between Southeast Asia and Japan / Taiwan.

TW HSR Buy1Get1 promotion for international visitors until 31May. Travel must be completed within 30days of booking. Distribution through KKDay and Klook in SEA.

Taiwan Tourism offers FREE half day tour for pax with 7 to 24 hours layover starting 1May 2023.

Additionally, Taiwan Tourism also offer NTD 5000 incentive in the form of prepaid card or accommodation vouchers for 500,000 independent tourists staying 3-90days in Taiwan, with campaign running from 1May 2023 to 30Jun 2025.

Campaigning & Activation

MY: CH Illustration Exhibition in Eslite Spectrum in conjunction with STS promotion (1 May - 18 June 2023) including 8 B2C Travel Talks & Media Launch.

STS - STP FREE Travel Days promotion generated much hype. Close to 15,000 STP sold from SEA across all validity types and across all sales channels.

TH: incorporate KOLs social media contents from TH Famtrip

KAM

STS - STP FREE Travel Days promotion 15Apr-14May with Klook and KKDay



STS - KAM FAM trip with RE 2-10May with 8 participants including 2 OTAs.

STS - Uniworld SG Cruise Week presentation on 19May to 30 VIP guests. Bundle STP 3Days with river cruises from Basel and Zurich.

STS - Swiss Illustration Exhibition Travel Talk 21May. CTA via A5 postcards with Parlo Travel

STS - Excellence Seminar in Kuala Lumpur, organized with OTMA 22May

STS - Trade Seminar in Kuala Lumpur organized by Boustead Travel 23May

STS - Summer Newsletter to Trade on 1Jun

STS - Support Dominique for SCIB SIN JKT KUL events 23-29Jun

MY: B2B Presentation at NUH Travel Product Presentation Event on 29 May

MY: B2B Presentation at MATTA Travel Exchange on 14 June

SCIB: SCIB SEA Roadshow, 23-30 June, Singapore, Indonesia, Malaysia & Thailand with 5 SCIB partners & DW

TH: Joint marketinh activity with Quality Express

TH: Fam trip + KOLs, 10 participants, 6-16 June 2023, Lifestyles theme

TH: One World Tour & Travel new product development - Cycling tour

TH: D-Star group new product development (result STMS)

TH SCIB: Asia Trophy get-together dinner with SCIB partners participation, 30 June

SEA: ITMA Muslim product itinerary launch

KMM

MY - KOL Desmond Tey Media Trip

MY - KOL Charles Kuay Media Trip

STS - Hhighlight STP FREE Travel Days promotion and GTToS on travel review websites Travel Intern, Tripzilla.com, Tripzilla.my, Singpromos, TheStar.com.my, WillFlyForFood.net, Thailand Tiew Eng social posts, Mothership.sg social posts

STS - Highlight Summer Season travel with STP and GTToS on Sin Chew Malaysia digital daily + FB and IG social posts

TH: Articles Valais & GEX / Zurich & Lindt on Coconuts / Soimilk

TH: Article Spring activities in Switzerland on La Vie En Road

TH: Article Swisstainable on Robb Report May issue

TH: Article Swisstainable on Luxuo Thailand



Future Activities

STS - roll banner distribution by PWT to Kuala Lumpur trade.
STS - Trade Seminar in Singapore 18Jul
STS - Sales call to Kuala Lumpur with Richard RE 19-21Jul
STS - Trade Seminar in Bangkok 10Aug
STS - Trade Seminar in Saigon 11Aug
STS - Sales calls to Jakarta with Batiste ST 21-23Aug
STS - Trade Seminar in Semarang 24Aug
KAM SEA: Trade webinar, outdoors, 05 July
KAM TH - Trade dinner appreciation, Sep
KMM TH - Autumn briefing, Sep

Interesting observations

MY: Exchange rate reached historical high at 1 CHF to MYR 5
STS - JR Pass plans up to 77% rate hike from Oct 2023. 7Days JR Normal Pass will increase from JPY 29,640 to 50,000 while 14Days JR Normal Pass will increase from JPY 47,250 to 80,000.
TH: Exchange rate reached historically high at 1 CHF to THB 39



2. Active Markets

SPAIN

Market Situation

Almost reaching 2019 figures

By the end of Mai, Spain was only 2'500 ON behind the 2019 figures and the bookings outlook for this summer is being very positive.

Growth has proved resilient (OECD economic outlook june 2023)

Faced with a challenging environment in the context of Russia's war of aggression against Ukraine, the Spanish economy has held up remarkably well. GDP increased by 0.5% in the first quarter of 2023 compared to the previous quarter and was 3.8% higher than a year earlier. Business and consumer confidence have improved since the autumn, even if consumer confidence remains very low. The labour market is dynamic, with employment growth of 1.3% in the first quarter of 2023. The unemployment rate

decreased slightly from 13.0% in December 2022 to 12.7% in April 2023. Headline inflation (harmonised index) fell to 2.9% in May, owing to lower energy prices.

Campaigning & Activation

- **Production of an GToS map** highlights the sections along Lucerne, Fribourg, Mürren/Schilthorn and Aletsch Arena. 100'000 copies distributed with the main touring clubs in the market
- Together with Zurich Tourism we produced 25'000 beautiful **cardboard fans with a Dadaism look at the All Those Food Festival in Barcelona**. The back of the fan invited to explore the special content about Zurich on a microsite on MyS.com reaching over 4'000 QR code scans
- Under the topic «**Made in Switzerland**» we produced a printed booklet with a variety of products, experiences and traditions that are 100% Swiss. 100'000 copies distributed in lifestyle magazines like El Pais Semanal and ELLE
- **Roger Federer on the high-speed train between Barcelona and Madrid** where we customized all the seat trays with the GToS and the special Swiss Travel Pass promotion
- We participated at the Adventure Experience event in Barcelona and Madrid promoting the **GToS with ZERO electric motorcycles**. We had a photocall at their stand and distributed postcards.
- Production of the **first family travel guide about Switzerland in Spain**. WildKids is a spanish family that produces travel guides and has been twice in CH as part of our Heidis Modernos campaign
- Distribution of 50'000 **AMoS booklets in the AD magazine**, a high-end publication about design, art and architecture

KAM

- B2B and B2C trade campaigns with Viajes El Corte Ingles, Catai and Icarion including exclusive



digital brochures, emailings and SoMe.

KMM

Media events with Zurich Tourism In Madrid and Bilbao

Mediatrips

Viajes National Geographic to Lucerne, Rigi and Zurich, 12.-15.05.2023

TVE Aquí la tierra to Fribourg Region, 29.-31.05.2023

Magazine Gourmets to Ticino, 07.-11.06.2023

Influencer Laura Celdran @lauraceldrans to 100% Women intl. mediatrip, 18.-24.06.2023

Travelphoto Magazine to Intl. mediatrip Summer in the cities, 24.-30.06.2023

Influencer @PatriciaFernandez to St.Gallen, Winterthur and Zürich, Cities Campaign 25.06-04.07.2023

Influencer @JudithTiral to St.Gallen, Winterthur and Zürich, Cities Campaign 21.-28.06.2023

Top coverage

Viajes Antena 3TV/LaSexta "Visitamos Grindelwald, la aldea de los Alpes suizos en la que se inspiró J.K Rowling", 350'000 online contacts

Magazine La Vanguardia "Glacier Express", 323'099 media contacts

Interview Radio Marca with Fribourg Region, 350'000 listeners

Xlsemanal.com, "Viaje en tren de la mano de un suizo excepcional" 618'000 online contacts

Lavanguardia.com, "El tren expreso más lento del mundo circula entre los Alpes suizos" 1'594'000 online contacts

Viajesnationalgeographic, "El valle de las 72 cascadas que coronó James Bond", 417'601 online contacts

Blog Salta Conmigo, "El tren panorámico Bernina Express, trucos y consejos", 150'000 online contacts

Lavanguardia.com, "Descubre la magia alpina de Suiza", 1'594'000 online contacts

Forbes Magazine, "Geografía relojera", 52'500 media contacts

ABC, "El corazón y el cerebro de Berna", 251'925 media contacts

20 Minutos, "Personajes de leyenda en pueblos del lago Lemán", 493'013 media contacts

20minutos.es, "El favorito de Freddy Mercuy y otros pueblos con encanto a orillas del lago Lemán", 1'586'000 online contacts

Entrevista Radio Euskadi con Zürich y Uliana Shtoyko, 150'000 listeners

Elpais.com, "Estas son 13 de las mejores vistas panorámicas de Suiza", 1'919'250 online contacts

Switzerland Tourism.



Bikenbeer.es, "Fountain Dip, la nueva actividad Outdoor-Urbana de Suiza", 75'000 online contacts

Aquí la tierra "El queso Gruyère AP", 1'000'000 viewers

Total media contacts: 10'924'388