



# Market Updates

## July/August 2023

### Editorial

Dear Partners,

the further we proceed into 2023, the more it is becoming evident, that this is the year, in which we finally leave the CoVid crisis behind us. Our hotel overnights forecasts predict a return to the absolute height of 2019. So as of 2023, we will be able to return to the pre-CoVid mode to take the previous year as reference for the overall business development.

But even though the total pre-CoVid level is reached, some differences are evident:

The quick recovery was strongly supported by a very strong home market:Switzerland, still lies well above 2019. And in the overseas markets, there are substantial differences in the speed of recovery. While markets like the US, GCC or South East Asia are already healthily growing into new heights, India, China, and Japan are still clearly behind 2019.

This year's high season has as well confronted us with a new phenomena: in specific areas and at peak dates, hotels as well as trains have been simply sold out. And this challenge might appear again during the most crowded summer days in the next year, especially during the weeks, when the world's leading tourism destination goes into a "lockdown" during the Paris Olympics. One more reason for us to prominently position our autumn season.

Even though it normally gets a bit more quiet in many markets during the summer months, our global teams have again been very actively positioning Switzerland along the full marketing mix. But please read yourself!

Simon Bosshart  
Head Markets East



## 1. Priority Markets

### BENELUX

## Market Situation

### Economy:

NL: The Dutch economy has entered a recession as it shrank 0.3% on a quarterly basis in the second quarter, a first estimate published by Statistics Netherlands mid-August. The euro zone's fifth largest economy shrank for the second consecutive quarter, after a 0.4% contraction in the first three months of the year. Economic growth in the Netherlands had been almost 5% per year in 2021 and 2022 in a quick recovery from a COVID-19 slump.

BE: Economic activity in Belgium slowed in the second quarter of this year, raising fears of the country falling into a recession in the run-up to winter. Belgium's quarterly GDP growth rate decelerated to 0.2% from April to June this year, down from 0.4% from January to March.

**Sustainability:** a recent published study on Sustainable travel behavior of the Dutch travellers revealed that 40% of Dutch holidaymakers consider Switzerland a sustainable holiday destination.

## Campaigning & Activation

### Netherlands

- Trailrunnig.eu in Davos newsletter + blog
- ANWB camping online for Key Partner Made in Bern
- SALT Magazine blog + newsletter Bernina Express Rhaetische Bahn
- NKBV influencer trip Ticino hut to hut tour
- Thru-Hiking influencer - Via Alpina

### **City Marketing**

#### Netherlands:

- Campaign with Dutch magazine NOUVEAU, influencer trip to Switzerland + digital and print articles

#### Netherlands:

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

### **Summer Marketing**

#### Netherlands:

- Cycling campaign with NTFU (since May 2023 - KP package with all summer KP).

#### Netherlands & Belgium:

- Cycling ambassador campaign with Wielerflits & RIDE magazine, incl. social media campaign on ST



Meta and landing page on MySwitzerland.com (KP package with Vaud, Luzern & Laax).

- Evi Hanssen Swisstainable campaign on social media, MySwitzerland.com and Roularta (KP package with Bern, Wallis & Ticino).

## Meetings

### Belgium

- eNews sent by Corporateplanner.be to 4'000 contacts. Small introduction and link to online article about Bern

-Standalone eNews about Engadin St.Moritz sent to SCIB databse to 1530 contacts: Theme : Meet on top of the world

-Save the date sent to 285 contacts (agencies only) SCIB annual networking event On 18/10

### Netherlands

-Standalone eNews sent to SCIB Database to 483 contacts about introducing Kerstin, study trip in september and sustainable incentive travel with Kunoi Tumlare

- Save the date for SCIB annual Networking evening sent.

## KAM

Netherlands

- TravMagazine.nl + .be Online blogs Swisstainable hotels + GTToS

- Travel Store GTToS presenattion by Incento to 30 customers

## KMM

### Netherlands

15 sec. Videoclip on the 8700 screens in all Dutch Railways trains. URL: [www.NSinternational.nl/Zwitzerland](http://www.NSinternational.nl/Zwitzerland). Marketing contact Million 13

First annousmenets of 'Denkned aan Zwitserland winter Train TV show

## Future Activities

### **Winter Marketing**

#### Netherlands & Belgium:

- Digital campaign with ambassador Evi Hanssen on VDX.TV and SoMe for Valais and Bern

- Wide Oyster: digital articles for the Alpes Vaudoises

#### Luxembourg:

- Print and digital articles in the Luxembourger Tageblatt and Le Quotidien to promote Gstaad and Interlaken

### **City Marketing**



Netherlands:

- 2nd part of the campaign with Dutch magazine NOUVEAU, digital and print articles

Belgium:

- Digital campaign with Roularta media house to promote Ascona-Locarno

**Summer Marketing**

Netherlands & Belgium:

- Roularta article with Evi Hanssen contact (print & online)

- Ongoing cycling and Evi Hanssen campaign on ST Meta channels

**Meetings**

Belgium: SCIB Annual Networking evenings in Brussels : 17&18/10



## 1. Priority Markets

### FRANCE

#### Market Situation

Tourism minister unveiled a plan to regulate visitor flows at the most popular sites and lay out a strategy against "overtourism". Faced with surging numbers of visitors to historic landmarks such as Parc Naturel des Calanques, Mont Saint Michel or even Paris itself, France wants to put a lid on the tourist crowds that flood in each year.

The Olympic Games are already an important topic influencing factors such as the country's economy, politics, societal challenges, sustainable and tourism strategy. The Olympic and Paralympic Games will start in less than 365 days (Opening on July 26th 2024) and the government wants to foster economic development, reduce inequalities and promote employment.

(Source: france24.com)

#### Campaigning & Activation

SCIB:

- 12 articles publiés sur le blog. 16 667 visites sur le blog au total.

- Campaign with TGV Lyria and STS to promote city trips to Lausanne & Montreux by train from Paris with TGV Lyria as well as the GTToS. Media Partnership Radio Nova, les Inrockuptibles & Deezer. Influencer trip on the Grand Train Tour of Switzerland. Overall reach of over **800K+ people and over 300 TGV Lyria tickets sold.**

SWISS CITIES:

- Partenariat avec le Groupe Marie Claire et la marque Cosmopolitan. En print publiereportages sur les villes suisses parus dans Marie Claire (daté août), Marie Claire Idée (daté juillet/août) et Cosmopolitan (daté juillet). 3.3M reach. En digital mise en ligne d'un espace dédié aux villes suisse sous forme de carnet de voyage réalisé par l'illustratrice @cirquedepapier (photos prises par elle lors d'un voyage avec rajout d'illustration) avec, pour fil rouge, l'eau comme source de baignade ou pour se désaltérer. 1.8M reach - 80k visites.

- Partenariat avec la marque lebonbon (media lifestyle social, print et digital) : mise en ligne de 2 vidéos sur leur réseaux sociaux, une sur Zurich et une sur Bâle. 1.85M de reach par vidéo.

#### KAM

Des mois plus calme mais cependant actif en invitations des TO et agents de voyage pour le STM de septembre à Genève. Avec 7 buyers, le quota français à considérablement augmenté au fil des éditions.

SCIB:

- Afterwork à Lyon le 3 juillet. Nous avons sollicité un prestataire dans l'objectif d'obtenir des nouveaux clients corporates à Lyon + quelques agences. L'objectif est de leur présenter la Suisse ainsi que les



destinations présentes (ici Genève, Villars, Crans Montana, et Ramada Encore). Nous devions avoir 25 clients, mais beaucoup se sont décommandés à la dernière minutes à cause de manifestatio assez violentes dans la ville. Nous avons finalement eu 10 clients. 3 leads obtenus depuis cette rencontre.

## KMM

Juillet et août sont des mois traditionnellement plus calmes en KMM. L'été a pourtant vu un nombre plus élevé qu'a l'accoutumée en termes de voyages de presse. Plus précisément de tournages pour des chaines nationales

TF1 fin juin dans les Grisons ainsi qu'au Pilatus. Une seconde équipe dans les Franches-Montagnes Jurassiennes. France 2 le long des trains. Des tournages pour France 3 - Arte - ont eu lieux ou sont en cours tout comme une nouvelle édition de l'émission de France 5 Echappées Belles, une émission de 50min tournée en Valais. Radio également avec deux chroniques pour la chaine publique France Info.

## Future Activities

### KMM:

- Evenement presse Automne avec Berne Welcome à l'Ambassade de Suisse à Paris le 7 septembre
- Envoi de newsletter dédiées à Vaud Promotion et Made in BE à la rentrée
- Tournages TV et voyages de presse en nombre déjà planifiés.

### KAM:

- STM Genève - 7 Buyers participants pour la France

### SCIB:

- Newsletter dédiée à Davos.
- Webinaire dédié à Crans Montana.
- Participation au Workshop de Pure Meetings.
- Campagne média via Décision d'Achat.
- Eductour à Zurich
- Cocktail mix Challenge à Paris.



## 1. Priority Markets

### GCC

#### Market Situation

GCC countries' economies are likely to expand moderately in 2023. However, lower oil quota weigh on the first half year's growth. Non-oil sectors will continue to lead the GCC recovery, projected to grow 3.9% this year, likely reflecting a resilient domestic market.

The travel and tourism sector is also recovering strongly, with Dubai Airport expecting passenger numbers to exceed 2019 levels this year.

The stimulus from tourism, along with a surge in population and support from the government, are reflected in the UAE's overall economic growth and resilience to global economic headwinds.

#### Campaigning & Activation

MBC Trip. Date: 14-21 JUL 2023. The MBC crew with Haya Yasmeen and Sara Murad visited Switzerland to highlight Lucerne and Geneva. Results not available yet. Partner: Lucerne, Geneva, Buergenstock Resort and Four Seasons Geneva

Emirati Chef in Geneva. Date: 21-28 JUL 2023, Emirati chef visited Geneva, Results not available yet, Partner: Geneva

### KAM

Luxury Promotion Al Rais Travel – UAE. Date: 1 June - 31 July. 50 radio spots in Al Khaleejiya Radio (contacts: 2.5Mio), 15'000 flyers: distributed thru Al Khaleej Newspaper, Landing page on Al Rais Holidays website (reach: 10'000, Partners: Zurich & Davos.

Family Promotion\_Cozmo Travel – KSA. Date: 1 June - 31 July. E-mailers to the Cozmo customers database, Flyers Distribution, Social / GDN, YouTube campaign where the destination will be featured on Cozmo timeline, stories and promoted content. Partners: Geneva, LGR, Lucerne, Zurich, Ticino, CransMontana, GRF, Made in Bern.

Summer Promotion\_ITL - KSA. Date: 1 June - 31 July. 30 radio spots on MIXFM, 21 Newsletters, 40 Social media paid ads, Partners: Geneva, LGR, Lucerne, Zurich, Ticino, CransMontana, GRF, Made in Bern

Family Promotion\_ITL - Kuwait. Date: 1 June - 31 July. 20 newsletters, 39 Social media paid ads, Partners: Geneva, LGR, Lucerne, Interlaken, Zurich, Ticino, CransMontana, Zermatt, GRF, Jungfrau Region, Davos.

### KMM

Moshaya Family trip: Date: 3-8 JUL 2023, The Moshaya family visited Switzerland to highlight Zurich and Davos, Youtube video views: 1.7 Mio, Instagram: 34'563 likes and 514 comments, Instagram post reach: 366k, Instagram and Snapchat Stories views: 260k, Total contacts: 2.3 Mio, Partner: Zurich,



## Davos and Europcar

Emirati Influencers trip: Date: 21-28 JUL 2023, Two micro-Emirati influencers: Zainab AISawalhi (zainabalsawalhi) and Farrah AlAydi (farrahescapes) visited Switzerland to highlight Davos, Lucerne, Gstaad and Montreux. Farrahescapes Instagram: 74'085 likes and 1'609 comments, Zainabalsawalhi Instagram: 58'388 likes and 2'009 comments, Total: 132'473 likes and 3'618 comments, Partner: Davos, Lucerne, Gstaad and Montreux

VIP trip in Lugano, Date: 26-29 JUL 2023, the influencer Noha Nabil visited Lugano. Results not available yet. Partner: Ticino and Lugano

## Future Activities

- GCC delegation at STM Geneva
- STS content creator trip to Switzerland
- Autumn campaign distribution
- Media trip Crans-Montana and Geneva
- Media release and Social Media
- Health Mission GCC
- Ski Events FIS Ski Dubai
- Media Event Launch Antenna Partner integration JED and RUH
- Sales Cals GCC including 1 full week KSA
- Production LUXury, Famil and Inspiration brochure
- Winter KAM activities
- Medical newsletter





## 1. Priority Markets

### GERMANY

## Market Situation

### Vertrieb | Reiseveranstalter & Reisebüros.

Im Juli liegt der fakturierte Gesamtumsatz der im „ta.ts Reisebürospiegel“ erfassten Reisebüros mit plus 4,1%, ähnlich wie im Juni, nur leicht, aber beständig über 2022. Die kumulierten Werte Januar bis Juli 2023 zeigen weiterhin einen positiven Trend mit plus 37,2% gegenüber Vorjahr.

Das erste Mal in diesem Jahr sinkt der Wert des Touristischen Vertriebsklima-Index von Dr. Fried & Partner im August 2023 auf einen Wert unter 110. Damit befindet er sich auf einem ähnlichen Niveau wie in den Jahren 2017 und 2018 zur gleichen Zeit. Sowohl bei der Bewertung der aktuellen Lage als auch beim Blick in die Zukunft zeigen sich die Reisebüros derzeit etwas pessimistischer. Dennoch bezeichnet die Hälfte aller Teilnehmenden ihre Lage weiterhin als gut (Vormonat: 52,7%). 40,4% schätzen die aktuelle Lage als befriedigend ein. Das sind 1,5 Prozentpunkte weniger als im Juli. In Bezug auf die Nachfrage nach Reiseleistungen gibt es keine Veränderung zu Juli bei dem Anteil der Teilnehmenden, die eine gleichbleibende Nachfrage erwarten (weiterhin 54,8%). Dafür gehen nur noch 25% von einer Steigerung aus (Vormonat: 32,3%) und 20,2% erwarten eine sinkende Nachfrage (Vormonat: 12,9%). Trotz der wieder sinkenden Gesamtstimmung befindet sich der Touristische Vertriebsklima-Index mit immer noch über 100 Punkten auf hohem Niveau, so die Beurteilung der Unternehmensberatung.

### Verbraucher

Die Laune deutscher Verbraucher hat sich wieder etwas verbessert. Die Forscher des Marktforschungsunternehmens GfK sagen für August einen Anstieg ihres Barometers um 0,8 auf minus 24,4 Punkte voraus. Nach einem leichten Rückgang im Vormonat stabilisiert sich die Verbraucherstimmung damit wieder. Als Hauptgrund für die optimistischere Stimmung nannten die Expertinnen und Experten vor allem "die Hoffnung auf rückläufige Inflationsraten."

### Wirtschaft

Null Prozent Wirtschaftswachstum im zweiten Quartal, dazu 6,2 Prozent Inflation im Juni und ein Rückgang im produzierenden Gewerbe: Die wichtigen Konjunkturdaten, die die wirtschaftliche Lage Deutschlands beschreiben, weisen nach unten. Mit einem plötzlichen Aufschwung ist zunächst wohl nicht zu rechnen. Der Internationale Währungsfonds (IWF) erwartet für dieses Jahr ein Schrumpfen der deutschen Wirtschaft um 0,3 Prozent, auch die Bundesbank rechnet mit einem Rückgang des Bruttoinlandsprodukts in diesem Umfang. Die Bundesregierung geht laut der im April vorgelegten Frühjahrsprojektion für dieses Jahr dagegen von einem BIP-Plus von 0,4 Prozent aus. Die Wirtschaftsweisen sagten in ihrer Wachstumsprognose vom März immerhin ein Mini-Wachstum von 0,2 Prozent voraus. Aber: Der Preisdruck in Deutschland lässt weiter nach: Die Erzeugerpreise für landwirtschaftliche Produkte sind weiter gesunken, und auch die Preise auf Großhandelsebene haben erneut nachgegeben.

## Campaigning & Activation

**Davos Bike Camp:** Teil der 100% Women Kampagne. Mit 25 Teilnehmerinnen.

**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 (Meta, YouTube, Pinterest und Display Ads) beworben.

**Jura Dreiseenland Bike Kampagne:** Gemeinsam mit der Influencerin @globusliebe wird eine Radrundreise durch das Jura Dreiseenland von 1.-20. August 2023 promotet. Der von der Influencerin erstellte Content wird auf mySwitzerland.com aufgebaut und über Social Media sowie die Outdoor App Komoot beworben.

**City Recovery Dooh & Mobile Ad Kampagne:** vom 20. Juli bis 09.08. wurden die Schweizer Städte mit Video Anzeigen über Digital out of Home Flächen promotet. Die Videoanzeigen von der „Summer in the City“ Kampagne wurden mittels eines klassischen online Bieterverfahrens auf verschiedene Videoflächen in deutschen Großstädten in Süddeutschland (Baden-Württemberg & Hessen) ausgespielt. Gleichzeitig wurden User mittels Geo Targeting mobile Anzeigen zu den Schweizer Städten auf ihr Smartphone ausgespielt mit dem Ziel, dass sie auf die MySwitzerland Webseite gehen.

#### **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. Die darauf basierende Social Media Kampagne erzielte solide Ergebnisse.

**Tessin:** In Ascona Locarno und den umliegenden Tälern verbrachte Beatrice einen unvergesslichen Urlaub. Dabei wurde Content für eine anschließende Digitalkampagne erstellt. Die darauf basierende Social Media Kampagne erzielte weit überdurchschnittliche Ergebnisse.

**Made In Bern Geo Nature Camp:** Vom 27.06.-02.07. fand die Gewinnerreise des GEO Naturecamp mit MiB statt (ET am 13.09. in der GEO Septemerausgabe.) 3 Gewinner verbrachten traumhafte Tage in den 4 beteiligten Regionen. Der dort entstandene Content wird für Print Advertorial und begleitende SoMe Kampagne ab September genutzt (siehe Future Activities)

**Zürich 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.

**Winterthur City Kampagne mit Republic / FAZ:** Digitales Advertorial und verschiedene Werbemittel (Banner) im Kampagnenzeitraum 24.07.- 03.09.2023.

**Winterthur Gay Marketing:** Crossmediale Kampagne blu media für die Bewerbung der Stadt Winterthur sowie ihrer Sehenswürdigkeiten und Events. Facebook, Instagram & Print Spartacus.

**Kooperation mit Content Creatorin Louisa Dellert:** Swisstainable-Reise mit dem Nachtzug nach Zürich und Graubünden (Val Poschiavo) vom 20.-24. August 2023. Tägliche Stories und Reels für den Instagram-Kanal und den TikTok-Kanal sowie Linked-In-Post und Erwähnung im Linked-In-Newsletter. 5 Zitate der Content Creatorin werden für die Swisstainable-Kooperation mit der ZEIT verwendet.

**Architektur und Wohnen mit dem Wallis:** Bezahlte redaktionelle Strecke (print und online) zum Thema „Architektur und Nachhaltigkeit in der Hospitality“, 8-seitige Reportage in der Printversion in der Ausgabe 5/23 und zusätzliche Bewerbung über Social Media in der Architektur und Wohnen und Online-Advertorial ohne Kennzeichnung.

**Swiss Cities Sommerkampagne mit Condé Nast:** Digitales Visual Advertorial zu Summer in the City und Fountain Dip mit Fokus auf Basel, Zürich und Lugano und Integration ausgewählter Luxushotels auf AD online und Bewerbung mit Anzeigen über Social-Media-Kanäle von AD, Vogue und GQ. Garantierte Reichweite: 800.000. Kampagnenzeitraum: 24.7. - 16.9.2023.

**Kooperation mit den KadeWe Celebration Days in HAM, BER und MUC:** Verlosung von Hotelaufenthalten in Schweizer Luxushotels (7132 Vals, Kempinski Engelberg, Tschuggen Arosa) an die VIP-Kunden und Integration des ST-Logos und der Hotellogos in den Newsletter vom KadeWe.



## KAM

**Chamäleon Reisen:** Akquise von neuem nachhaltigen Abenteuerreisen Anbieter Chamäleon. Ein gemeinsames Marketingabkommen für 2024 ist geplant, das zwei bis drei verschiedene 8-10-tägige Touren durch die Schweiz beinhaltet, jeweils inklusive Swiss Travel Pass.

**Unique Moments Berlin:** Treffen von 20 vielversprechende Luxus-Reisebüros aus Berlin gefolgt von Followup-Mail mit massgeschneiderten Angeboten und Ideen für Schweiz-Reisen.

**Business Club Stuttgart:** Networking und Teilnahme an Event, um die wichtigsten Entscheidungsträger aus der Region Stuttgart kennenzulernen. Der Schwerpunkt lag auf Leisure & MICE.

**Studienreise DERTOUR Sports:** Fokus auf Möglichkeiten Trainingslager in Graubünden.

**Raiffeisentours RT-Reisen:** Kick Off Termin mit RTK als Dachgesellschaft der Holidayland, Reiseland und Alpha Reisebüros - mit mehr als 3500 Reisebüros größte Reisebürokooperation Deutschlands und darauf folgende Follow Up Mail. Weitere Kooperation tbd im Oktober.

### MICE:

Site-Inspection Basel am 7. und 8. August sowie

Basel MICE Days am 25. August zum Kennenlernen der Meeting-Locations sowie zum Networking.

Sales Call-Workshop am 21. August in Zürich mit Learnings über die aktuelle Marktsituation und Herausforderungen im Rahmen von Sales Calls.

## KMM

**Medienreise für Digitale Swisustainable Branded Story @ZEIT online:** Im Rahmen der Recovery Kampagne bereiste die Journalistin nachhaltige Höhepunkte Graubündens, führte Interviews (Valsana Arosa, Bergluft Sommelier, etc.) und erlebte Swisustainable hautnah, um ihre Ergebnisse & Erlebnisse authentisch in die Branded Story einzubringen.

**Medienreise Content Creator @travel\_with\_domi, 121k Follower** Unterstützung mit Reisearrangements, resultieren mehrere Posts und Stories, ohne weitere Bezahlung.

**Medienreise Playboy:** Im Rahmen unserer Recovery-Kampagne organisierten wir eine Medienreise mit dem Playboy-Team, bestehend aus einem Fotografen, einer Redakteurin und zwei Playmates, die insgesamt 1,2 Millionen Follower auf Instagram erreichen. Die Reise führte zu einer umfassenden 8-seitigen Reportage über den Goldenpass Express sowie die Orte Montreux und Crans-Montana.

**GMR Reka-Ferliendorf Hasliberg 29.7. - 5.8.2023:** Erfolgreiche Umsetzung einer Familienmedienreise mit insgesamt 8 Medienschaffenden u.a. von touristik aktuell, Badische Zeitung, Heilbronner Stimme, Schwäbische Zeitung.

**Individuelle Medienreisen:** In den Monaten Juli und August hat das KMM-Team Deutschland 26 individuelle Medienreisen organisiert.

**Mediennewsletter:** Aussand des KMM-Newsletters im Juli und August an einen Verteiler von 2400 Kontakten



## Future Activities

**Event mit SALON am 4.9.:** in Kooperation mit Swiss Deluxe Hotels (SDH) und dem Magazin SALON findet ein festlicher Anlass in Düsseldorf statt. Sternekoch Yannick Crepau bekocht 80 hochkarätige Gäste, Leser und Leserinnen in Sammlung Philara für zeitgenössische Kunst.

**Bahntastische Schweiz am 08.9.23 in Berlin:** Abendevent im Technikmuseum, organisiert durch die Schweizer Botschaft mit Schweiz Tourismus als einer von drei Hauptpartnern.

**Switzerland Travel Mart in Genf** mit 29 kuratierten Reiseveranstalter:innen. Forecast für Logiernächte 2023 beruht auf rund 512k LNs.

### **KMM Mediendinner und KAM Meet & Greet:**

- Mediendinner mit Davos-Klosters am 06.9. in Frankfurt
- Mediendinner mit Flims-Laax am 18.10. in Hamburg
- Mediendinner mit Winterthur am 19. September in Stuttgart
- Mediendinner Cities mit allen A-Städtepartnern in München
- Meet & Greet Graubünden im Oktober in Nürnberg & Frankfurt
- Meet & Greet Tessin im Oktober in den Städten München & Frankfurt

### **Winterlancierung 2023:**

Game Show Event in Berlin. Wir spielen 1,2 oder 3 mit 50-60 Medienkontakten

**So klingt der Schweizer Herbst:** Diese Digitalkampagne fokussiert auf Klänge aus dem Schweizer Herbst aus den Regionen Bern, Tessin und Wallis. Die Bewerbung erfolgt im September über Facebook, Instagram, YouTube und Spotify.

**Made In Bern Geo Nature Camp:** Print Advertorial zum GEO Naturecamp mit MiB mit Erscheinen in der GEO am 13.09. und darauf basierte SoMe Kampagne (IG Story).

**Digitale Swisustainable Branded Story @ZEIT online:** Entlang der Grand Train Tour werden Swisustainable 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.

**WDR / 1LIVE, Snowtrex, TOI Interlaken:** mit Start Weihnachten 2023 werden 2 Wochen lang täglich (Mo-Fr) 20 Plätze einer Reise nach Interlaken verlost inkl. Hotel, Ski, diversen unterschiedlichen Programmpunkten. Start der Auspielung in der Morningshow (=Primetime 900T Hörer/Stunde), begleitet von allen relevanten SoMe Kanälen (IG, TikTok, FB, Snapchat, etc.); Schweiz Tourismus ist Initiator und Vermittler der Aktion, Abwicklung und Durchführung erfolgt via Snowtrex / TOI Interlaken.

## Interesting observations

**Management-Buy-out SALON, Hamburg:** Nach dem Kahlschlag bei Gruner und Jahr gelingt der Redaktionsleiterin Anne Petersen das Management-Buy-out der Zeitschrift. Die erste SALON-Ausgabe unter neuem Management erscheint im September. ST Zusammenarbeit im 2023 mit SDH und Grand Tour Delux)



## 1. Priority Markets

# GREATER CHINA

## Market Situation

### SCIB:

- Currency exchange rate and economic situation are not positive for the outbound business. Some companies also adjust their incentive structure for the future requests, big delegations are very prudent and sensitive for pricing evaluation.

### LEISURE:

- Leisure travel is coming back strongly over the Summer season. In June we recorded 44% recovery rate in terms of overnights compared to 2019 and forecast for July to September looks promising. While the same challenges persist (high costs, low flight availability, exchange rate etc.), the market is clearly on the road to recovery.

## Best practice competitors

### LEISURE:

- Spain and Australia have been very active with big media coverages. Spain was among the first to do a media trip (Q1 of 2023) and is investing big budget in media spend. Australia booked a 3D ad in Chengdu and invited media representatives to join the launch of their big, animated 'welcome back' campaigns.

- Both Spain and Australia are known in the market for their good visa processing, which helps their reputation.

## Campaigning & Activation

- 3 ST Travel TV on Fliggy from July- August, Zurich, Schilthorn, Davos, RhB, Titlis, Luzern

- Summer splash mini app social campaign online from 7th August - 8th September

## KAM

### SCIB:

- Destination wedding promotion in Macau on MITE fair (30 June - 2 July).

- Destination Wedding: Chinese Valentine's Day B2C event: 22 August

- Destination Wedding: Wedding planner swiss brunch event in Beijing: 22 August

- Individual sales call in south China, visits of end consumers and agencies (3 - 7 July).



- Zurich Webinar training 1: 11 July.
- SCIB Webinar training: 15 August.
- SCIB NL Release: 9 August.

#### LEISURE:

- Tade roadshow in 10 cities for 5 days with 2 groups of Swiss partners kicking off at the end of August
- ITB China coming up mid September in Shanghai
- partnerships with OTAs ongoing (C-Trip, Mafengwo, Tuniu, Klook)

#### KMM

- Media trips:
  - BRTV documentary shooting Mr. WANG Xiaoming, culture campaign, in Zurich and Lucerne, broadcast in Oct 2023
  - International media trip: STS Swiss history end August
  - Vlogger support end August, STS, Lausanne, Zermatt
- Summer splash media event in Chengdu, August 24th , 20+ KM
- Radio live

#### Future Activities

##### SCIB:

- Destination Wedding International FAM trip: 1 Pax from China, 4 - 8 Sep.
- SCIB STM MICE Buyer: 2 Pax, 8 - 14 Sep.
- SCIB Sales call tour with 4 partners: Beijing, Shanghai and Taipei, 23 - 27 Oct.
- SCIB corporate weekend event: 28 - 29 Oct.
- Geneva Webinar training: 17 Oct.

##### LEISURE:

- Small tennis community activation in September - October for Roger's visit to Shanghai
- Winter Roadshow by the end of October in 5 Tier-1 cities
- Swisustainable event in Hong Kong with VIP key accounts in October
- ITB in Shanghai mid September



## 1. Priority Markets

### ITALY

## Market Situation

### Gotthard Base Tunnel

The Gotthard base tunnel is one of the main routes for tourists travelling between Switzerland and Italy. The closure of the tunnel after the accident on 10 August caused considerable inconvenience to travellers and it is estimated that it will take several months to repair. As of 4 September, Swiss Railways' online timetables have been updated with replacement trains running on the old Gotthard panoramic route. The travel time is extended by approximately one hour and the capacity is reduced. Normal passenger traffic is expected to be restored in early 2024. This situation is expected to have a negative impact on Italian tourists travelling to Switzerland by train.

Following the accident, the third (autumn) wave of the ST/Trenitalia campaign with Michelle Hunziker, intended to promote the direct Eurocity connection from Italy to Swiss cities, was canceled.

## Campaigning & Activation

### Campaigning & Activation: OOH Roger Federer campaign.

Period: 19.06 - 30.07.2023

What: OOH Roger Federer campaign with IGP Decaux

4 vintage trams with exterior full-wrap branding and interior posters

RF visuals (Bernina Express, Glacier Express, Goldenpass Express, Südostbahn) and QR code

Contacts: 8.609.244

Partners: RhB, STS

### Campaigning & Activation: Digital campaign with Teads.

Period: 23.06 - 31.08.2023

What: Native Advertising campaign with Teads to promote summer activities in Valais

Impressions: 26.793.344

Clicks: 130.233 (partial results)

Partner: MRAG (Aletsch Arena, Martigny Region, Leukerbad)

### Campaigning & Activation: Influencer trip Swiss Cities campaign.

Period: 29.06 - 02.07.2023

What: Influencer trip to Lucerne and Lugano with Laura Masi @ruberry (82.000 followers) as part of the Swiss Cities campaign





Content: 1 IG post, 2 reels (Lugano & Lucerne) and 55 stories (Link)

Impressions: 58.000

Video views: 22.000

Partners: Lucerne, Lugano, STS

**Campaigning & Activation: Advertising on La Freccia Sans Frontieres magazine.**

Date: 01.07.2023

What: Advertising page on bimonthly magazine LA FRECCIA Sans Frontieres (Italian-French magazine distributed on board of Frecciarossa trains between Milan and Paris)

Focus: Grand Train Tour of Switzerland (Bernina Express visual)

Contacts: 12.500

Partners: STS, RhB

**Campaigning & Activation: Advertising on La Freccia magazine.**

Date: 01.07.2023

What: Advertising page on monthly magazin LA FRECCIA (board magazine on Frecciarossa trains)

Focus: Grand Train Tour of Switzerland (Glacier Express visual)

Contacts: 262.500

Partners: STS, RhB

**Campaigning & Activation: Digital OOH Roger Federer campaign.**

Period: 03.-30.07.2023

What: Digital OOH Roger Federer campaign with IGP Decaux

217 digital bus shelters in Bologna, Genova, Milano and Pavia

170 metro displays in Brescia, Milano, Roma and Torino

RF 15" snippet and QR code

Impressions: 5.741.894

Partner: STS

**Campaigning & Activation: E-Newsletter July.**

Date: 04.07.2023

What: ST E-Newsletter July (Link)

Market inputs:

Vacanza gratis in Vallese

Locarno Film Festival





Contacts: 25.620

Open rate: 35.28%

Partners: MRAG, Ticino (Ascona-Locarno)

**Campaigning & Activation: Promotional video with Michelle Hunziker.**

Date: 14.07.2023

What: Launch of the video

“Sul Jungfrauoch con Michelle” on Michelle Hunziker’s Instagram channel (Link)

Views: 912.000

Likes: 21.000

Partners: Made in Bern (Interlaken, Jungfraubahnen), STS

**Campaigning & Activation: OOH Swiss Cities campaign at Swiss Corner in Milano.**

Period: 17.-23.07.2023

What: OOH campaign at Swiss Corner in Milano to promote Summer in Swiss cities (2nd wave)

9 lightboxes with campaign visuals

1 ledwall with campaign video

Impressions: 250.000

Partners: Basel, Bern, Geneva, Lausanne, Lucerne, STS, Winterthur, Zürich

**Campaigning & Activation: Influencer trip Swiss Cities campaign.**

Date: 19.-21.07.2023

What: Influencer trip to Basel with @marta\_unavaligiadisogni (103.000 followers) as part of the Swiss Cities campaign

Content: 1 IG post, 1 IG reel (Link) and 38 stories (Link)

Partners: Basel, STS

**Campaigning & Activation: Advertorial with “Teatro alla Scala” Milano.**

Date: 24.07.2023

What: 2-pages advertorial in the ballet program Romeo e Giulietta at “Teatro alla Scala” Milano

Distribution: 5.000 copies to all guests on location

Partner: Vaud

**Campaigning & Activation: E-Newsletter August.**

Date: 31.07.2023

What: ST E-Newsletter August (Link)



Market inputs:

Zurich rooftops

Summer in Berne

Contacts: 15.824

Open rate: 38.83%

Partners: Made in Bern (Bern Welcome), Zürich

**Campaigning & Activation: Advertising on La Freccia magazine.**

Date: 01.08.2023

What: Advertising page on monthly magazine LA FRECCIA (board magazine on Frecciarossa trains)

Focus: Grand Train Tour of Switzerland (Gotthard Panorama Express visual)

Contacts: 262.500

Partner: STS

## KAM

### Fam Trip

Date: 21-23.07.2023 Participants: 6 travel agents

Focus: Site inspection hotel Andromatt Radisson and The Chedi, excursions in summer

### Event

Date: 06.07.2023. Summer Party in Roma. Organized by Travel Quotidiano in Valmontone Village Magicland. Focus: Summer experiences. Partners: RhB.

Participants: 80 pax

## KMM

### Media results

- 32 million

- 15 journalists invited to Switzerland

- 1 media newsletter about video with Michelle on Jungfrauoch and water sport in Interlaken.

### Top coverage

- Article about Geneva and new Science Gateway on newspaper Il Giornale di Vicenza (readers: 187'000; publication date: 12.07)



- Article (2 pp.) about Bally Foundation in Lugano on travel monthly magazine Bell'Europa (readers: 76'000; publication date: 01.07)

- Article (1 p.) about new cable car Matterhorn Alpine Crossing on viaggi.corriere.it (235'000 weekly visits; publication date: 03.07)

- Article (2 pp) about Michelle in Switzerland on newspaper QN (readers: 267'000)

### **Group media trip & TV troupe**

- Trip in Geneve (06.07-09.07.2023) focus on CERN, Reformation Museum, vineyards and boat cruise; Participants: 6 journalists.

- TV Troupe in Poschiavo and in Engadin (26.07 – 28.07.2023) for broadcast MELAVERDE Canale5

- TV Troupe in Fribourg and in Berner Oberland (27.08 – 03.09.2023) for broadcast GEO Rai 3

### **Media Meeting**

Exclusive event for Wallis in Rome. Date: 05.07.23

Location: Domiziano stadium, The remains of the Stadium of Domitian lie under Piazza Navona (listed by UNESCO as a World Heritage Site), about 4,5 metres beneath the street level, covered by a wide skylight.

Presentation of Wallis in collaboration with an archaeologist during the visit of the stadium. Participants: 30

## **Future Activities**

### **Swiss Family Village**

Period: 21.09-01.10.2023

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

Trade workshop on 20.09, Opening and media event on 21.09

Launch of the partnership with new ST ITA ambassador Yann Sommer.

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



## 1. Priority Markets

# NORTH AMERICA

## Market Situation

### USA:

Switzerland Tourism was named Best Tourist Board at this year's Virtuoso Travel Week, a great credit to our trade relations team.

The S&P 500 index is up nearly 17% year to date, and the Nasdaq composite is more than 30% higher. Americans keep spending money, unemployment is low, and the Federal Reserve may soon pause its painful interest rate hikes as inflation rates steadily — albeit slowly — come down.

Nevertheless, some clouds are hanging over the US economy, refusing to shift. They include the health of China's economy and the tension between the US and China, heightened geopolitical tensions around the war in Ukraine, and fears of contagion around the regional banking crisis in March.

In May and June, the US was the biggest source market of Switzerland Tourism, reporting an astounding 29% increase in June compared to 2019, and we are on course for a record year.

### Canada:

The Canadian market has seen a strong 7.1% growth in Switzerland's overnight stays compared to 2019, up to June. July's spending trends remain positive. However, the early summer travel surge is losing momentum due to the impact of Bank of Canada's ten interest rate hikes this year on Canadian homeowners and tenants.

On a different note, 2023 has brought Canada's largest recorded wildfire season, notably affecting the outdoor industry in British Columbia. While air travel to Europe and Switzerland remains unaffected, the extensive fires have posed challenges to various sectors within Canada's outdoor industry.

## Campaigning & Activation

- 1st August B2C Event at International Airport Vancouver, Edelweiss, STS, August 1
- Cities/Edelweiss Digital Campaign, ongoing until end of Aug
- Hotels/Accommodation Campaign w/ AFAR, ongoing until Oct
- Reoccurring social campaign to gain eNL subscribers, ongoing until the end of the year
- Hopper Campaign w/ Made in Bern & Graubunden, ongoing until end of Aug
- TSQ Billboard, ongoing until the end of the year
- BLUM podcast campaign, ongoing until the end of Aug
- Glacier CTV Campaign, mid-Aug until mid-Sept
- GTOS Campaign w/ ELLE/Hearst, mid-Aug-end of Sept



- Made in Bern Campaign w/ Tripadvisor, Aug-Nov
- Distribution of Flyers on Schengen Visa issued in SFO, TOR, MOR (June - Oct)

## KAM

### KAM

- GTM West, Henderson, July 11 - 13
- ST Trade webinar with Zurich, July 13
- Connexion Vancouver, B2B event with SWISS and Air Canada. July 20
- ST Trade webinar with Glacier Express, July 27
- VIP Dinner Vancouver, Edelweiss, STS, for 1st August celebration, July 31
- Virtuoso Travel Week Las Vegas, August 13 - 18

### SCIB

- Global Meetings Exchange (GME) ACCOR, Paris - July 17 - 20
- Leading Hotels of the World Educational Trip, August 25 - 31

## KMM

- Euro Games LGBTQ Media trip in Bern, July 27 - 30
- Science & Architecture in EPFL and CERN Science Gateway by Renzo Piano avant-premier group media trip for science and architecture media 17-22.07

## Future Activities

### KAM

- Virtuoso Forum Canada, Vancouver October 4 - 5
- ETC Event, November 21st
- ST Trade webinar with SOB, September 7
- STM Geneva, September 10 - 14
- ST Trade webinar with STS, Sept. 21
- Consortia Fam Trip with Avanti, ZRH/TI/Zermatt, September 16 - 22
- ILTM North America, Bahamas, September 18 - 22
- ST Trade webinar with Bürgenstock, October 5
- Tauck Travel Academy, Montreux & Bern, October 1 - 7
- Consortia Fam Trip with Avanti, Geneva/Lausanne/Interlaken, October 7 - 13
- Trade Sales Calls Midwest & Texas, October 9 - 13
- ST Trade webinar with Geneva, October 19
- Lucerne business plan with Alpine Adventures, Sept - Dec.

### SCIB



- Prestige Event, MN, September 27
- DW Educational Trip, October 4 - 8
- IMEX America, LV, October 17 - 19

**Campaigning & Activation**

- Valais Matterhorn campaign w/ Nico Hischer, mid Sept-mid-Oct
- Winter Campaign w/ T-Mobile, Sept-Nov
- Zurich Campaign in SF, Sept-Oct
- Media Trip for next year's Timeout Campaign, Oct



## 1. Priority Markets

### UK/IRELAND

## Campaigning & Activation

Blum paid promotion with:

Wallpaper: online hub, traffic drivers & social amplification + e-newsletter

MAGS: Creative PR agency, coordinating paid promotion and pitching BLUM to media in the UK

Out of Home Promotion Waterloo:

Take over of the biggest indoor screen in Europe: Promoting the Grand Train Tour of Switzerland incl. Roger Federer. Timed with Wimbledon Grand Slam Tournament to get Roger on the spotlight to the right time.

Add on: Geo targeted online/social campaign promoting GTToS

Autumn promotion

Distribution of the Main Autumn Spot:

Via cinema screen advertising, to targeted audience receptive to Swisstainable/ Swiss Autumn messaging - 23 June – 27 July

Focus - selected luxury, independent, art-house cinemas

Pre-roll cinema screen advertising, 75sec spot showcased on UK-wide cinema screens

Spot featured on cinema ad reel prior to main film (Silver placement)

Telegraph

Mosimann Rally 2023, promoting Swiss Deluxe Hotels & GTToS

Media Trip took place in June with Anton & Katrin Mosimann and a journalist from Telegraph UK and a filmer/photographer to produce content

SDH additional invited CH content creators and media

Paid promotion in the UK via Telegraph: online long read & one full page print article

Coverage in CH: Gault Millaut Channel, Schweizer Illustrierte, Marmite (to follow)

Wired of Adventure (Niche/ premium outdoor platform)

Individual activity: Valais

July 2023 – In Focus: Brig-Simplon

Editorial print feature, Digital content feature, Digital ads + side panels/ take overs, E-newsletter – 30k distribution, Bespoke SoMe – organic & targeted



## KAM

-2-6th July 2023 Fam trip to Jungfrau Region and Adelboden-Lenk-Kandersteg with 7 UK/Irish Travel Advisors

-BtoC Campaign with Tour Operator Inghams including Royal Hampton Garden Show, Digital and Social Media, targeted newsletter, external targeted marketing with call to action

-16th August 2023 Swiss Day at TUI head office with training, quiz and chocolate making workshop for 30 travel advisors and 48 calling in remote

## KMM

5 July: AITO Summer Soiree, media speed dating and exchange

11 July: Top Editors dinner with the Alpine NTO's France, Italy, Germany and Austria - hosting 14 top media contacts

23 July: Swiss National Day, networking with the Swiss community and guests

2 August: Distribution media newsletter

16 August: media release BLUM via partner agency for the release of the last two episodes / Social Media posts

## Future Activities

-Starting Swisscast series again in September with guests STS and BLS

-Grand Yodel Fam trip for 50 agents 9th-13th October 2023

-Aspire Travel Awards 18th October 2023 with Switzerland Tourism short listed as best Tourist Office of the year





## 2. Active Markets

### AUSTRALIA

#### Market Situation

Despite cost of living pressures in the economy, Australians remain committed to spending on travel. Sydney airport was operating at 87.8% for July 2023 compared to July 2019. Melbourne airport tracking at a similar recovery level.

Increasing focus is being placed on the luxury segment/high value traveller in this market. An example is that at the Virtuoso Global Conference held in August, Australia was identified as the sixth largest market for affluent travellers globally for the coming next five year period. Virtuoso AU/NZ was the highest growth region from Jan-Jun 23, edging out the USA and Latin America, with YOY growth at +32%.

Another positive development was the recent announcement by Emirates, that all of their three daily flights into Sydney will be operated by the A380 aircraft from 04 Nov onwards, increasing capacity by 2000 per week. Welcome news as we continue to experience airfares that are on average 35% more expensive to Europe compared to 2019.

Switzerland Tourism Australia was delighted to be nominated by the industry as “Most Popular Tourism Destination” at the upcoming National Travel Industry Awards. This is a first time nomination for ST at these prestigious industry awards.

#### Best practice competitors

No major scale activity from other European tourism offices during this period.

Destination Canada has been particularly active across the trade and media sector, with a diverse array of product and experiences.

Tourism Fiji has had exceptional results, being one of the few destinations to post double digit growth in 2023 compared to 2019.

#### Campaigning & Activation

Finalising the following B2B coop campaigns for the remainder of 2023;

- TTC/Trafalgar Tours Swisstainable Tour campaign
- Rail Europe/STS/ST
- Entire Travel - Dec 2024
- Holidays on Location

#### KAM



Key activity highlights;

- Hosted Webinar with STS - record turn out 240+ registrations
- Hosted and coordinated Perth lunch event for 50 key agents with partners LX/RE and Entire Travel Group
- Launch partner with ATIA (Aust Travel Industry Association) including online blog, EDM and another webinar (this time featuring partners from Zurich, Lucerne and Interlaken).
- Coordinating participants for the upcoming Winter and Christmas markets fam trip departing late Nov.
- Various activity in conjunction with ETC

## KMM

We sponsored three journalist visits during the month of August (2 AU based and 1 NZ based).

Various paid media releases including;

Mindfood - DPS on Zurich

Signature Luxury and Style - DPS on Swisstainable travel

Great Walks - digital campaign

Coordinated;

Signature Media 100 Wonders of the World content - print and digital

Get Lost media trip with journalist and videographer to focus on Zurich and Lucerne

Reviewed potential opportunities for TVC broadcast participation in 2024

## Future Activities

Trade Lunch in Canberra with Rail Europe - 19 Oct

Webinar with STS and Rail Europe - Panoramic Trains - 24 Oct

ETC Trade events - 31 Oct & 01 Nov

Christmas media lunch - Dec



## 2. Active Markets

### AUSTRIA/HUNGARY

#### Market Situation

Inflation trifft immer mehr die Mittelklasse: gerade auch im Dienstleistungsbereich haben sich die Preise empfindlich erhöht; die „Mitte“ beginnt zu sparen. Aber auch österreichische Tourismusbetriebe sind deutlich teurer worden - d.h. dieser „Nachteil“ im Vergleich zur Schweiz bessert sich wieder.

Generell machen die Österreicher neu kürzer Urlaub.

Veranstalter berichten aber nach wie vor, dass das Bahnprodukt sehr gut läuft.

#### Campaigning & Activation

- 1. Juli 2023: BEX-Advertorial im Reise Aktuell Magazin (44'000 Stück Auflage)
- 21. August - 30. September: Zürich-Anreisekampagne „50% Rabatt auf Zürich Card für ÖBB-Reisende“ in Kooperation mit Zürich Tourismus, STS und ÖBB. Display & Native Ads mit 11'720 Klicks und kampagenspezifischer Microstire auf MyS
- Weekend Gewinnspielkampagnen mit Basel - Gewinnspielreise von Basel im Juli und Nachbericht erscheint am 31. August 2023

#### KAM

- 5 Juli 2023: Corps Touristique Sommerevent in Kooperation der nationalen Tourismusorganisationen mit 212 Gästen (Reiseagents & -journalisten)

#### KMM

##### **Presse e-Newsletter:**

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

##### **Tourismuspresse.at-Aussendungen:**

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

##### **Medienreisen:**

Im Juli und August 2023 wurden individuelle Medienreisen für 6 österreichische MedienvertreterInnen organisiert.



## Future Activities

- 14.-17. September 2023: Gruppenmedienreise „Vom Vierwaldstättersee zum Genfersee inkl. Fahrt mit dem GoldenPass Express“ für 6 österreichische Medienvertreter in Kooperation mit dem KAM Raiffeisen Reisen
- 4.-30. September 2023: Recoverykampagne „Herbst in der Schweiz mit allen 5 Sinnen“ mit eigenem Channel auf Oe24.at
- Weekend Gewinnspielkampagnen mit Rausch Nachbericht im September
- Workshop Reihe Wien, Linz und Salzburg im Oktober



## 2. Active Markets

### BRAZIL

#### Market Situation

One of the main topics being discussed in Brazil right now is the tax reform, approved in the House of Representatives at the beginning of July. There will still be a long negotiation in the Federal Senate, but the most important thing is that this topic is key to contributing to economic growth in the long term, with the simplification of the tax structure in the country, which is currently chaotic. The expectation is that there will be an approval still this year.

Meanwhile, other factors are also following the line to assist the country's growth. The first one is inflation, which in June presented a slight retraction of 0.08% according to IBGE, driven by the main consumption groups, food, and beverages (-0.66%) and transportation (-0.41%). A record grain harvest, an increase in the bovine slaughter, and stable climate conditions have contributed to the drop in meat, soy-derived product, and fruit prices.

This deflation in June fits like a glove to declare the potential onset of a cut in interest in the upcoming meeting of the Central Bank's Monetary Policy Committee in the first week of August. Today, SELIC is at 13.75% and the expectation is that it will drop to 13.75% a year.

The high interest has impaired the pace of economic activity. For example, the manufacturing industry, despite the 1.9% growth in May, presents a downturn in the four-month period of -0.4%, with an annual retraction of 11.6% in capital assets being in the spotlight.

Regarding commerce, sales dropped 1% in May, but are increasing 1.3% in the year. According to the last data disclosed by IBGE, although it'd had a reduction in general, the evaluation was relatively positive because important sectors like supermarkets, fuels, drugstores, and household appliances presented growth of 1.5%, 10.8%, 7.6%, and 6.7%, respectively. The expensive credit hasn't halted shopping by consumers. However, they end up paying a much higher final price, because of financial costs, and the default risk increases.

In relation to this variable, currently, Brazil totals 29.2% of families presenting some kind of overdue bill, according to the survey carried out by the National Confederation of Trade, CNC. The rate has shown resistance to decrease, and the current threshold is still above an average of close to 24%, which was seen before the pandemic. It's a process for the mid-and long- term. Lower inflation and the heated job market have allowed an income recovery and the paying of overdue bills. Nevertheless, besides a lower, and constant inflation, assistance coming from the reduction of interest is necessary.

The service sector continues to be lifted off from the country's general average. In May, there was a 4.7% growth, and it accumulated a 4.8% increase a year. It's worth remarking that this group was the first one to be impacted by the crisis, and naturally, it ended up being the last one to recover from it. According to data by IBGE, the dissipation of the positive variation is clear, from the services that are provided to the families (2.8%), passing through the technology and communication services (4%), to transportation (7.1%).

Regarding tourism, inserted in the service sector, there was a 7.1% growth in May and revenue of R\$ 18.1 billion, according to the survey carried out by FecomercioSP. In the year, the accrued amount grew 13.6% driven by the expressive performance of air transportation, of 25%. Besides the improvement in economic conditions of job positions and income, prices linked to tourism, especially flight ticket prices, have cooled down and even dropped, which brings a potential increase in expenditure. Employment has been an important pillar of the Brazilian economy. The unemployment rate for the first quarter was 8.3% in May, against 9.8% from the same period last year. This is the lowest threshold since 2015, according to IBGE. Looking at another source of data, the General Register of Employed and Unemployed Workers, CAGED of the Ministry of Labor, a generation of 865



thousand formal job positions took place this year in the country, from January to May.

And Brazil has also been benefiting from a more stable foreign scenario. The search for more profitable markets has turned the country into an important destination for resources. So much so that the value of the Brazilian Real has been consolidated below 5 reais, and currently oscillates around R \$ 4.80 per dollar.

Therefore, although some negative figures could emerge, Brazilian's economy's general balance is positive, with the economy growing, generating job positions and income. The elevated interest rate, which limits consumption and investments, should start dropping soon and this will be a milestone for a stronger new expansion cycle of the Brazilian economy.

#### IMPORTANT FACTS:

- 1) Between the months of June and July, the auto- mobile industry benefited from the discount program for popular cars. In total, an amount of 650 million reais in tax credits was spent, resulting in a sales estimation of 125 thousand vehicles in the period.
- 2) The number of foreign tourists doubled and reached almost 3.2 million people in the first six-month period of the year.
- 3) The average interest rate for consumers in Brazil is 45.4% a year. The highest rate in the market is currently the credit card's revolving rate, at 455% a year.
- 4) In one more update, IBGE disclosed the record new estimation of 307.3 million tons for agricultural harvest for 2023.

#### CONFIDENCE INDEXES:

The Consumer Confidence Index (ICC) registered a 2.5% growth in June in the monthly comparison, and rose 21% in the annual counterbalance, reaching 125.3 points. The job market expanding, and inflation cooling down, bring relief to consumers' wallets, being able to increase consumption in the short term. The reduction in interest will help increase optimism in the mid-and long term.

The Trade Entrepreneur Confidence Index (ICEC) decreased by 3.1% in June and is back to 104.4 points, a threshold 13% below the one seen in the same period last year. This is the lowest threshold since July 2021. Although sales are increasing, business owners struggle with the high financial costs and tight profit margins, given suppliers' high costs. The trust should resume growing when interests drop because besides relieving the company's finances, it will contribute to the increase in families' shopping.

#### EUROPE IS THE CURRENT BIG THING

An article in July's issue of PANROTAS Magazine with tour operators confirms the trend of trips to Europe. Brazilians are thronging the already packed destination in the summer, and there is already a hard time to get last-minute reservations.

Italy and Portugal are the preferred countries, and the operators are recommending new destinations for those who still want to travel this year, to run away from "overtourism" and higher prices. Some companies have already started sales for 2024, given some European destinations are with full occupancy.

Right after Europe in Brazilians' preference comes Argentina, with Bariloche regaining its crown as winter's queen. Brazilians go to this destination to see snow, enjoy some different activities compared to the ones we have in Brazil, and also ski, which is not the main purpose of those who go to Bariloche. Many operators opted for a charter to the destination or even blocking of flight seats in large quantities.

In the United States, the preference is still Florida and New York, but the waiting line to get the visa



continues to be an issue, besides flight ticket prices and the general costs in destinations like Miami and New York, considered as really pricey, at the moment, by Brazilians.

From January to June this year, 710 thousand Brazilians have been to the United States, according to statistics disclosed by the National Travel and Tourism Office of the U.S. Department of Commerce. The goal is to reach 1.5 million by December. Brazil represents one-third of the 2.1 million visitors coming from South America in the period, and it's the fifth international market (excluding Mexico and Canada), behind:

The United Kingdom – 1.7 million

India – 815 thousand

Germany – 785 thousand

South Korea – 722 thousand

Brazil – 710 thousand

Latin markets that come right after are:

10th – Colombia – 401 thousand tourists

13th – Argentina – 293 thousand

16th – Chile – 209 thousand

17th – The Dominican Republic – 296 thousand

18th – Ecuador – 204 thousand

In June, Brazil sent 127 thousand visitors to the United States, the second-best month of the year, after January (135 thousand). In June, Brazil got fourth place in sending tourists to the US, ahead of South Korea.

#### WHICH ARE THE GREATEST INTERNATIONAL AIR TICKET SELLERS IN BRAZIL?

PANROTAS had access to the Smash report, of international air ticket sales in Brazil, from January to June this year. BeFly, CVC Corp, Confiança, Decolar, Sakura, Ancoradouro, BRT, Skyteam, CWT, and BCD Travel are the ten major issuers.

Reminding that the Smash report only brings the companies that have a direct relationship with the airlines. A TMC, for example, which buys half of its air tickets from a consolidator, will appear in the ranking with only the half amount bought directly from the airline. The other half is accounted in the consolidator's share. The market's estimation is that Smash represents 70% of the international airfare sales in Brazil because some companies like Iberia and British, and part of Latam, for example, don't have their data computed in this process.

It's, however, a great indicator of how heated the international air travel market is. Through Smash, BeFly's growth in sales, in relation to the first semester of 2022, was 54%. Confiança has grown 40%, Despegar 32%, Sakura almost 60%, Ancoradouro other 40%, and BRT 50%. CVC Corp decreased by 5% in the report, in relation to 2022. BCD with 38%, Copastur with 60%, and Kontik with 50% of growth prove that corporate trips also follow a growth tendency.

Check the rankings for general according to sales, consolidation, and number of tickets.

#### THE TOP 20 GREATEST INTERNATIONAL AIRFARE SELLERS (from January to June 2023 – only international air tickets – source: Smash report)

1 – BeFly: US\$ 250 million



- 2 – CVC Corp: US\$ 242.6 million
- 3 – Confiança: US\$ 172 million
- 4 – Decolar: US\$ 165 million
- 5 – Sakura: US\$ 98 million
- 6 – Ancoradouro: US\$ 87.2 million 7 – Grupo BRT: US\$ 83.1 million
- 8 – Skyteam: US\$ 56 million
- 9 – CWT: US\$ 35 million
- 10 – BCD Travel: US\$ 34 million
- 11 – CNT: US\$ 30 million
- 12 – Teresa Perez: US\$ 27 million 13 – Copastur: US\$ 26 million
- 14 – Frontur: US\$ 25.2 million
- 15 – Etraveli: US\$ 22 million
- 16 – Smiles: US\$ 21 million
- 17 – Transpac: US\$ 20.1 million
- 18 – Tyller: US\$ 20 million
- 19 – Kontik: US\$ 15.2 million
- 20 – Grupo Voetur: US\$ 13.2 million

**TOP 10 COMPANIES IN ISSUED FLIGHT TICKETS:**

(from January to June 2023 – only interna- tional air tickets – source: Smash report)

- 1 – Decolar: 310 thousand
- 2 – CVC Corp: 286 thousand
- 3 – BeFly: 220 thousand
- 4 – Confiança: 160 thousand 5 – Sakura: 93 thousand
- 6 – Etraveli: 92 thousand
- 7 – Ancoradouro: 92 thousand 8 – BRT Group: 86 thousand
- 9 – Smiles: 70 thousand
- 10 – Skyteam: 60 thousand

## Campaigning & Activation

### **-Campaign & Activation – Zurich Digital Campaign**





**Between, May 20<sup>th</sup> and June, 20<sup>th</sup>**

- Meta Campaign on Facebook and Instagram.
- Campaign to promote Zurich in the summer as part of Business Plan 23.
- 1'815'910 Impressions
- 103'733 clicks on link
- Budget CHF 3'000

**-Campaign & Activation – Destination Wedding**

**Constance Zahn**

**July**

- Banner online on Constance Zahn website.
- Constance Zahn is the best media to promote destination wedding in Brazil.
- Campaign for 3 months
- Page views: 1.2MIO/ month

Link [MySwitzerland.com](http://MySwitzerland.com)

- Instagram post on Constance Zahn @constancezahn 351K followers

Campaigning and activation: Swiss National Day

**August 01<sup>st</sup>**

- Attendance at a special cocktail at Switzerland Consulate's house in São Paulo
- Over 200 VIP guests including media contacts and Swiss tourism partners (Swiss, Swisslearning, Jungfrau Railways, Lucerne Tourism/ Titlis).
- ST Presence:  
Mara Pessoa, Trade Manager  
Natalia Leal, Marketing Manager

**KAM**

**-KAM/Digital Newsletter: Health Tourism**

**Highlight:** Health Tourism dedicated newsletter

**02<sup>nd</sup> mailing:** July 06 and 19

**Mailing:**

26.500 mails for travel agents



160 mails for corporate travel managers

1.800 WhatsApp messages to TAs

**Opening rate:** 24,62%

**Newsletter link:** <http://smtp.mailnewsdobrasil.com.br/email/SUICA-07-DE-24-2023/suica-07-de-24-2023.html>

**Key partners highlighted in the content:**

Health Tourism partners

**-KAM/Digital Newsletter: Zurich**

**Highlight:** Zurich dedicated newsletter

**02<sup>nd</sup> mailing:** July 14 and 27

**Mailing:**

26.500 mails for travel agents

160 mails for corporate travel managers

1.800 WhatsApp messages to TAs

**Opening rate:** 28,95%

**Newsletter link:** <http://smtp.mailnewsdobrasil.com.br/email/SUICA-11-DE-24-2023/suica-11-de-24-2023.html>

**Key partners highlighted in the content:**

Zurich Tourismus

**-KAM: Switzerland Guide launch event by Orion Operadora**

**07 July 2023**

raining & Breakfast event in partnership with Orion Operadora

City: Porto Alegre, Rio Grande do Sul

Target Audience: 13 travel professionals

B2B Switzerland Sales Manual by Orion Operadora: <https://corner.stnet.ch/trade-br/wp-content/uploads/sites/49/2023/08/Guia-de-Vendas-Suica-versao-1.pdf>

**Key partners highlighted in the content:**

Swiss Travel System (Bernina Express, Glacier Express, GoldenPass Express, Gotthard Panorama Express, Luzern–Interlaken Express); Swiss

Switzerland Tourism team presence:

Mara Pessoa, Trade Manager

**-KAM: Travel Agent Networking Lunch – Porto Alegre**



**06 July 2023**

City: Porto Alegre, Rio Grande do Sul

Networking lunch event with 05 key luxury travel agents (Danielle Filippozzi Viagens Personalizadas, Miks Travel, Nossa Agencia Viagens e Turismo, Fernanda Maissonave Travel Company, Art travel)

Switzerland Tourism team presence:

-Mara Pessoa, Trade Manager

**-KAM: Sales Calls Porto Alegre**

**06 July 2023**

City: Porto Alegre, Rio Grande do Sul

Sales Visit to OP Turismo (Virtuoso Agency), Mercatur Premium Tour Operator, and Orion Operadora offices.

Switzerland Tourism team presence:

-Mara Pessoa, Trade Manager

**-KAM: Training Seminar Embark Beyond Brasil**

**8 July 2023**

Hybrid training seminar session for travel agent members of Embark Beyond Brasil

City: São Paulo

Target Audience: 10 travel professionals

**Key partners highlighted in the content:**

-Swiss Travel and Swiss

-Switzerland Tourism team presence:

-Mara Pessoa, Trade Manager

KAM/Digital Luxury Newsletter: 7132 Hotel

**Highlight:** 7132 Hotel dedicated luxury newsletter

**Mailing:** August 14<sup>th</sup> and 28<sup>th</sup>

**Mailing:**

700 mails for luxury travel agents

**Opening rate:** 71.38%

**Newsletter link:**

<http://smtp.mailnewsdobrasil.com.br/email/SUICA-13-DE-24-2023/suica-13-de-24-2023.html>

**Key partners highlighted in the content:**



7132 Hotel

- Corinne's visit and KAM events.

## KMM

### **KMM – Press release Zurich in the summer 23**

**July, 1<sup>st</sup>.**

-Press release highlighting the events and new attractions in Zurich during the summer 23.

-Mailing: 600 journalists

### **-KMM – Press release Bike Tours in Switzerland.**

**July, 30<sup>th</sup>.**

-Press release highlighting the bike tours in Switzerland during the summer.

-Mailing: 600 journalists

-Click [HERE](#) to read the article.

### **-Media Trip: Tv Globo**

**Between: August 15<sup>th</sup> and 19<sup>th</sup>**

-Media trip as part of Business Plan "summer offensive".

-Globo television is the biggest television in Brazil. Television program: "Esporte Espetacular". Audience: 15MIO.

-Focus of this trip: cover summer sports.

- Zürich: Stand Up Paddle, Wakeboard and Urban Surf.

-Zermatt: Alpine Crossing and biking "5 lakes".

ST support: 2 flight tickets, STP, program and meals in Zürich and Zermatt.

### **-Media Trip: Fabiane Gama**

**Between: August 16<sup>th</sup> and 18<sup>th</sup>**

-Media trip to cover the new "Alpine Crossing"

-@byfabigama: 566K followers on Instagram

-Focus of this trip: very good profile to cover the Alpine Crossing and Zermatt in the summer.

-ST support: 2 meals experience and ticket to the Alpine Crossing.

### **-Media Trip: Mari Campos**

**Between: August 20<sup>th</sup> and 27<sup>th</sup>**



- The journalist Mari Campos participated in the International Media Trip STS and 1 overnight in Zurich.
- Mari Campos will publish the article on Panrotas and Estadão (national newspaper)
- Focus of this trip: Cover the sustainable of Swiss travel system and a luxury program/ hotel in Zürich.
- ST support: Flights, STP and program.

**-Media Trip: Diana Krepinsk & Sarah Mattar**

**Between: August 21<sup>st</sup> and 27<sup>th</sup>**

- Media Trip as part of Business Plan “summer offensive”
- @didikrepinsk 144K & @sarahmattar 304K followers
- Focus of this trip: Cover the summer in the partners destinations.
- ST support: Flights, STP and program in Zürich, Luzern and Zermatt.
- Corinne’s visit and interviews.

## Future Activities

MONTREUX JAZZ FESTIVAL RIO - 12-14 Oct  
Main recovery campaign of 2023 promoting RF and GTToS  
Robb Report Day in September  
Promotional event with top HNWIs in a luxury compound outside SP city  
Polo Day sponsored by St. Moritz / ESTM  
In the same compound, annual polo tournament



## 2. Active Markets

### CZECH REPUBLIC

#### Market Situation

##### Tourism update:

- ON statistics June 2023/2022: +7,1 %; ON statistics June 2023/2019: -8,1 %
- ON statistics July 2023/2022: +2,7 %; ON statistics July 2023/2019: +10,1 %
- new announced daily connection Prague – Zurich 7x a week – 4<sup>th</sup> rotation (PRG – ZRH in 06:55, ZRH – PRG in 21:00)
- Eurowings launched its new connection from Prague to Geneva for summer with price starting at 40,- CHF per route

#### Campaigning & Activation

- July – 3 months Switzerland promo in OC Flora via 16 TV screens with focus on Aletsch Arena, Davos Klosters, Lower Engadin, JFB, Lucerne, Pilatus, RhB, Rigi, Schilthorn, SGV, Schilthorn, Titlis and Zermatt Bergbahnen
- July – 2 months video promotion in departure hall of Terminal 2 (Schengen flights) at Prague Airport Václav Havel focused on Rhaetian Railways and Schilthorn Cableways
- 4. 7. – Exclusive e-newsletter focused only on Davos Klosters (Davos Klosters Premium Card, Summer Guest Program, hiking possibilities, biking possibilities, vacation with children, hotel packages by Mountain Hotels Davos) send out by magazine SNOW to its newsletter subscribers
- 11. 7. – ST Newsletter 7/2023 with promotion of: GToS, GTToS, Fountain Dip by ST, Swisstainable, exception overnight possibilities, Typically Swiss Hotels, accommodation by Czechs in Switzerland, bike possibilities in DDK and Lower Engadin, unique cable cars in Switzerland, Matterhorn Alpine Crossing, Mala Albula (garden railway network of RhB in CZ), Bogn Engiadina Scuol, Alpine cheese dairy in Samnaun, Excellence Class in GEX, Camping possibilities with Pilatus Bahnen, round trips offers by CZ tour operators, and photo of the month from Rigi.
- 18. 7. – Davos Klosters partnership and active participation at Swiss. – Czech golf tournament in golf club Beroun with promo of Davos Klosters summer possibilities
- 10. 8. – contest partnership at fundraising gala evening as part of Prague Pride with small ST giveaways
- 21. 8. – on-line advertorial at Alpenverein website OEAV.cz for Czech Republic with focus on active vacation with adrenaline (Davos Klosters, Jungfrau Bahnen, Aletsch Arena)
- 21. 8. – on-line advertorial at Alpenverein website OEAV.cz for Czech Republic with focus on Swisstainable (Lower Engadin, Lucerne, SGV, Pilatus, STS)
- 22. 8. – on-line advertorial at Alpenverein website OEAV.cz for Czech Republic with focus on hiking vacation with public transport (Rigi, SBB, STS, RhB, Zermatt Bergbahnen, Gornergrat)
- 25. 8.–10. 9. – digital banner campaign at lifestyle and travel LGBT+ website Lui.cz (Lucerne, Davos



Klosters, Rhb)

## KAM

- 10.–15.7. Indiv. FAM trip for TO Natour
- 17. 7. – Sales calls for Davos Klosters with TO EliteVoyage, TO Adventura, TO Toulky Evropou

## KMM

- July – 8/1 advertorial in print travel magazine Koktejl focused on summer vacation in Switzerland
- 1. 7. - 1/1 RhB advertorial “Holidays in Switzerland with RhB” in onboard magazine of train company Leo ExpressWings
- 1. 7. – 5/1 RhB advertorial focused on summer activities and possibilities with RhB (incl. Davos Klosters, Engadin) placed in premium lifestyle printed magazine Choice
- 7.–13. 7. – TV Media trip to Lower Engadin, Davos Klosters, RhB, Bern and St. Ursanne
- 8.–15. 7. – Indiv. Media trip for digital magazine CzechCrunch.cz with focus on wheelchair vacation in Switzerland (8. - 15.7.2023)
- 12.–16. 7. – Indiv. Media trip Touring for Premium Media Group and Premium Golf magazine
- 1. 8. – 1/1 AD focused on GToS with Roger Federer in premium lifestyle magazine Luxury Guide 8/2023
- 20.–26. 8. – CZ participation at Intl. Media Trip STS Swissness & Swiss History (magazine Zivot, website Hashtag.zoznam.sk and lifestyle magazine Miau)
- 20. 8. – publishing of new print book “Funiculars of Europe” with main focus to Switzerland
- 24. 8. – 8/1 advertorial in premium lifestyle magazine Marianne in autumn special edition with added promo by publisher and increased number of print copies of 179.000 with promotion of STS, Davos Klosters, Lower Engadin, RhB, Arosa, Chur, JungfrauBahnen, Schilthorn, Zermatt Bergbahnen, Aletsch Arena, GToS and GToS
- 24.–28. 8. – Indiv. Media trip to trail running race to Zermatt (SWISSmag, AktivTono.cz)
- 26. 8.–3. 9. – Indiv. Family media trip to Lower Engadin with Interhome for website newspaper Novinky.cz and newspaper Pravo
- 31. 8.–3. 9. - Influencer trip Czech Social Awards with 7 top influencers in the market to Zermatt

## Future Activities

- ST Newsletters (B2C & B2B)
- individual media and influencer trips
- KAM e-newsletter
- media advertorials (print and digital)

**Switzerland Tourism.**



- 2 weeks RhB radio campaign
- e-contests at Denik.cz





## 2. Active Markets

### INDIA

#### Market Situation

The latest figures on arrivals and overnight stays, namely those June, certainly need interpretation and additional information. Regarding the figures:

Arrivals: 45'196 (-33.9% ) - Arrivals in the same month of 2019 were: 68'380

Overnights: 98'340 (-34.8%) - overnight stays in the same month of 2019 were: 150'790

As for the evolution from January to the end of June, we record:

Arrivals: 137'231 (-32.3%) - Arrivals from January to June 2019 were 202'731

Overnights: 312'469 (-31%) - Overnights from January to June 2019 were 452'787

While these figures at first glance may seem disappointing, there are other factors that confirm to us that the market is doing well and even recovering.

On the one hand, the statistics on visas issued by our embassy in Delhi, which compared to 2019 show an increase.

Same for the sales of Swiss Travel System, which both with the spring promo achieved very positive results (first market in number of product sales, second market in terms of sales) but also the trend with respect to 2019 is growing (+13% until the end of July).

Even the most important Tour Operators confirm the trend of strong growth of customers opting to stay in apartments (and this is not considered in our statistics). AirBnb, while not giving precise figures on individual markets, confirms a 200% increase in Indian customers opting for their apartments.

We are confident that by the end of the year the market will recover points. The much-mentioned extended season is also confirmed by tour operators, but also by the visa section, which, compared to the past, sees a marked increase in the number of applications in the less popular months.

Even on the MICE front, the recovery is well beyond expectations, with major groups just realised and more already confirmed for the last four months of 2023.

#### Campaigning & Activation

- 15th Aug 2023: Ad in TravTalk (trade publication) promoting the Interlaken Webinar on 17th Aug 2023. Total Contacts = 108600.

- A series of 4 advertorials focusing on topic "Zurich as a hub destination" were placed in Travel + Leisure magazine, Conde Nast Traveller, India Today Spice as well as Vogue, in partnership with Zurich Tourism in July 2023

#### KAM



**SCIB:**

- Sales call to MICE agencies and corporate clients in Ahmedabad.- July 2023
- Sales call to MICE agencies & Corporate clients in Kolkata - August 2023
- Sales call with Zurich Tourism in Mumbai - August 2023

**KAM Leisure:**

- Sales Calls with TAs in Mumbai across July 2023
- 20th July 2023: Exclusive destination training for the ST B2C Digital Media Team at iProspect. Total No. of attendees = 4
- 21st July 2023: Exclusive destination training for the sales, operations and products team at TBO Mumbai. Total No. of attendees = 23
- 8th - 11th Aug 2023: Sales Calls in Hyderabad and Chennai. Total No. of TAs / TOs met = 9.
- 17th Aug 2023: Exclusive 45 min webinar for the Travel Trade Highlighting The Interlaken Holiday Region & Jungfrau Railways. Presenters included Interlaken Tourism, Outdoor Switzerland & Jungfraubahn Total No. of attendees = 562.

**KMM**

- ST supported a small film shoot -"Tara and Aakash - Love beyond Realms" - a story based 90% in Switzerland in Aug 23 by organizing STS passes, helping with filming permissions, getting the film to include a couple of panoramic trains as well as some ground arrangements. Film is supposed to be released on a streaming platform in Dec 2023.
- ST India sent 1 journalist - Ms Arzoona Dina to International media trips - STS: Swiss History and Swissness' international media trip by nominating a freelance travel writer
- ST partnered with Sejal Kumar, a popular lifestyle content creator, to promote the Montreux Jazz Festival across her social media platforms to her combined audience of 2.5 Mn, in collaboration with SWISS.

Total Reach on Facebook and Instagram, and Views on YouTube: 1'474'223

-ST India organized two media networking lunch events in key metro cities, Mumbai and Delhi, to introduce Zurich Tourism's newly appointed area manager to leading Indian travel and lifestyle media as well as freelance travel writers who actively contribute to these publications.

**Future Activities**

**SCIB:**

- International Destination Wedding Study trip. From 03rd to 8th September 2023 - 3 Indian wedding planners will participate
- STM in Geneva in September 2023 - 4 MICE planners will participate at STM
- Sales call in Chennai & Kerala - October 2023

**KAM Leisure:**



- Training and sales calls in Jalandhar on 6th Sept 2023
- STM 2023: 15 leisure buyers from India will participate at STM in Geneva
- Exclusive Webinar with Zurich Tourism on 28th Sept 2023
- Exclusive Webinar with Lucern Tourism on 5th Oct 2023
- Webinar featuring SWISS, BLS Interlaken, Swissminiatur & FoxTown on 12th Oct 2023
- ST India FAM 2023 10th - 17th Oct 2023 for winners of STA, STS Excellence Program and 2022 Webinar Series Quiz. 9 pax + 1 ST rep to travel to CH to experience Autumn season with the STP. Destinations to be covered are LGR, Lucerne & Zurich, along with their popular highlights / attractions.
- Destination training in Coimbatore on 31st Oct 2023.
- STE India in Mumbai, Chennai and Delhi: 25. Nov. till 1. Dec. 2023

**KMM:**

- Influencer trip with TV actor couple Gurmeet and Debina with their kids to focus on topic "Family" in Sept 2023
- 2 Cover shoots - one each with Filmstar Tamannah Bhatia and Master Chef Shipra Khanna in Global Spa Magazine in October 2023

**Campaign & Activation:**

- Shoot with Neeraj Chopra in Sept 2023 for partner Zurich
- Shoot with TV actors Neil Bhatt and Aishwarya Sharma for GTToS promotion
- STS autumn campaign display and social in September
- AUTUMN campaign on social media in October.



## 2. Active Markets

### JAPAN

#### Market Situation

The daily life in Japan has returned to normal. Covid is no longer a big topic neither in the media nor in every day conversations. However, flight capacity and the weak Yen still prevent the outbound travel market to bounce back. the recovery is steady but slow. Travel agents still report Switzerland as the best selling long-haul destination. the hotel capacity during July and August in Switzerland is worrying the industry however.

#### Campaigning & Activation

- 13 July: Travel Seminar for 'Life Partners', wealthy membership organization to promote luxury travel at the residence of Swiss Ambassador. 80 pax participated from all over Japan.
- 15 Aug -15 Sept: Swiss cities campaign: DOOH campaign in High-ed areas Roppongi Hills and Omotesando combined with a geo targeted digital video campaign.

#### KAM

- 1 Aug: Key account training and networking event for 45 tour operators and travel agents.
- 8 Aug: JATA webinar focusing on the theme wellness-travel align with Swisustainable and included partners' products.

#### KMM

##### Media Trip

- Jungfrau region exclusive media trip with 6 journalists.
- BS Fuji TV media trip in Jungfrau Region.

##### Media Result

Magazine:

- '25ans' magazine book-in book special article about in Zurich, Jungfrau Region, Ticino and Grand Train Tour of Switzerland routes (Gotthard Panorama Express and Luzern-Interlaken Express as the exposure of Ota campaign.
- 'Skyward, the JAL in-flight magazine introduces scenic train travels such as GoldenPass Express, Glacier Express, Chocolat train and lake cruises.

Online:

- 'MyNavi Women' introduces a series of 4 articles about hiking, lake cruises, hiking, Giessbach,



Jungfraujoch, Schynigeplatte in Jungfrau Region.

- 'BE-PAL.net' introduces a series of 3 articles about Eiger Walk hiking, walking in Nature Park Giessbach and Schynigeplatte.

## Future Activities

- JCB The Premium media trip.
- Mammut Mountain Day media trip.
- 2 Int'l media trips.
- Asahi TV 'Tabi Salad' media trip.
- Ota campaign talk show event.



## 2. Active Markets

### KOREA

## Market Situation

### [Economy]

According to the "August Consumer Price Trends" released by the National Statistics Office on the 6th, the consumer price index last month rose 3.4% from a year ago. This is the largest increase in four months since April (3.7%), and it has re-entered the 3% range for the first time in three months. The agricultural and fishery product prices last month rose 2.7%, with fruit prices rising 13.1% from a year ago. This is the largest increase since January 2022 (13.6%).

### [Tourism]

In the first half of this year, the travel and airline industry turned a profit. Thanks to the increasing demand for overseas travel after the pandemic, most companies continued their consecutive profitable streak in the second quarter following a successful first quarter.

Meanwhile, large companies, ranging from major online platform companies to distributors like Hyundai Department store, have ventured into the travel industry as a new business opportunity. The successive entries of these companies into the travel market are attributed to the growth in demand for overseas travel.

Furthermore, the recent government designation of October 2nd as a temporary public holiday has raised expectations in the travel industry for the 6-day holiday period from Chuseok to Gaecheonjeol. In 2023, this has become the longest holiday period.

## Campaigning & Activation

### Influencer Trip 2023

- Period: 3 - 12 Aug
- 4 Korean influencers visit major destinations in Switzerland to generate creative and vibrant travel contents
- To boost up travel needs of KR audiences by using the most powerful communication channel in Korea: Instagram
- Destinations : Zurich, Luzern, Jungfraubahnen, Interlaken, Shilthorn, Basel, Valais Region, Zermatt

### Being Swisstainable - longstays in Zurich with Korean Influencers

- Period: July 15 - Aug 3
- Communicate Swisstainable through influencers during long stays in Zurich
- During their stay they carried out postings of their life in Zurich and Switzerland with the story of swisstainable
- they also arranged meet ups with Korean travelers for exploring Switzerland suggesting Swisstainable ways of traveling.



## KAM

Swiss Travel Academy

- 5th Seminar of STA

- Date: Jul. 7<sup>th</sup>, 2023

- Venue: Swiss Embassy in Seoul

- Participants: 17 KAs of 17<sup>th</sup> STA participating members

- Program

Destination Schilthorn and Zurich Trade Presentation

Zurich presentation by ST

Local Rep. Presentations : Schilthorn by Panseung Kim

- 4th Seminar of STA

- Date: Aug. 6<sup>th</sup>, 2023

- Venue: Swiss Embassy in Seoul

- Participants: 17 KAs of 17<sup>th</sup> STA participating members

- Program

Destination Jungfrau Region, Interlaken and Jungfraubahnen

Presentation by ST

## KMM

Media Newsletters to 700 journalists in Jan & Feb respectively

\* Major results:

Joongang Joins: Long stay in Switzerland (Aug 25)

Daily Economy Online: Matterhorn Glacier Ride II (Aug 5)

eTravel News (Memo News): Lucerne Festival (Jul 14)

## Future Activities

Basel Night

- Period: Oct 12

**Switzerland Tourism.**



- A networking event to increase visibility of the city of Basel as an attractive location to all kinds of interest, including tourism, art, architecture and urban development.
- Target group: 80-100 guest are expected with media and VIPs





## 2. Active Markets

### NORDICS

#### Market Situation

Overall the situation is stable with Danmark doing slightly better than the rest of the Nordic countries. Inflation rate is currently shrinking but not enough fast and to the wished extent by the central banks. Currencies, especially the Swedish and Norwegian Krona is losing in value compared to the Swiss Franc, which makes Switzerland more and more expensive. Besides the economy there are security topics looming around, on one hand Russia's invasion into Ukraine and the involvement of Nordic states (NATO, weapon deliveries) on the other hand terror acts as an answer to Koran burnings. However, this has currently no direct impact on tourism towards Switzerland.

#### Best practice competitors

-

#### Campaigning & Activation

SE - Climbing Camp in Ticino

15-19 July. 8 participants, among them two professional climbers, produced content. Reach 2Mio.

#### KAM

##### TRADE

Various Fam Trips / Site Inspections

SE - Tour of Switzerland, Trave Beyond, 1 pax

14-17/7 - Schaffhausen, Bad Ragatz, St Moritz, Bernina Express, Lugano, Gotthard Panorama Express

DK - Fam Cities Nyhavn Rejsen, 1 pax

31/7-3/8 - Bern

3-6/8 - Basel

6-9/8 - Lucerne

DK - Train, GrønRejsen, 1 pax

22-24/8 - Interlaken

24-28/8 - Grindelwald



## KMM

### SoMe

SE - Eva Röse & Vanna Rosenberg, famous actors from Sweden visited Engadin and produced content from 9-13AUG. Contacts: 3,6Mio

Various SoMe trip in August, reported in September as content publishing not finalised yet.

## Future Activities

- Participation at STM 11-13SEP with 8 Nordic Buyers
- Media Breakfast in Helsinki on 19SEP with Valais
- Trade roadshow on 19SEP with Valais in Helsinki
- LH Group workshop on 19SEP with Davos in Stockholm
- FryFlyt film tour 4-5OCT in Oslo together with Davos
- 4 different events at SNO skihall 27-29OCT in Oslo together with Engadin - St. Moritz
- SoMe content creators in Basel.
- Various digital winter campaigns for several Swiss destinations



## 2. Active Markets

### POLAND

#### Market Situation

##### Politics

Polish President Andrzej Duda declared Sunday, October 15th the date for the next Parliamentary elections. The event will be highly anticipated, as it will decide Poland's political future for the next 4 years or more. It will be a choice between the now governing right wing PiS party - that favors nationalist policies, high social spending and the nationalization of a large part of the Polish economy - and the more liberal opposition of former Prime Minister and EU Council President Donald Tusk. Right now, polls suggest that both outcomes - an opposition win or four more years for the PiS - are quite possible.

##### Economy

The Polish inflation rate remains one of the highest in the EU, coming in at 10,8% in July, according to the Polish Statistical Office GUS. It fell from 11,5% in June, going down 0,2% on a month to month basis. However, analysts expect the further decrease to slow down, because energy prices will probably not continue to fall as quickly as they have in recent months, if at all. The Polish National Bank has indicated that they would like to lower interest rates in the autumn, if the inflation falls into single digits.

Meanwhile, Polish exports, have picked up speed, growing roughly 5% in the first half of the year, while imports dropped by almost 4%.

In terms of quarterly GDP numbers, Poland had some of the weakest of all EU countries, shrinking by 3,7% from the first to the second quarter, while the EU average stood at plus 0,5%.

The Polish currency gained some ground against the Swiss Franc in July, reaching a level of ca. 4,60 Zloty for one Swiss Franc, but lost some of the gains in August, now closing in on almost 4,70.

#### Campaigning & Activation

-Advertorial in ULTRA, Bimonthly magazine for runners and outdoor enthusiasts, 2 pages advertorial for Aletsch Arena

Edition July – August

Topic: trail running *Swiss Alps100* and outdoor activities in Aletsch Arena

QR codes, 10'000 copies, 42'000 reach

- SoMe activities during the run event in Aletsch Arena, 10. - 14.08.

3 pax trip to Aletsch Arena

Participation in Vertical and 50k run

Swiss Alps 100

Outdoor possibilities in the region promoted



SoMe of ULTRA magazine, runners' personal profiles

-Article/adverorial in NGTRaveler

Monthly travel magazine, August edition, 2 pages advertorial

Topic: Grand Train Tour of Switzerland, Golden Pass Express

20'000 copies, 420'000 reach

Information about our eGuide GTToS

- Sponsored posts on MyS Facebook, July - August

Topics: Swisstainable, Biking women, cities, GTToS

Reach so far 420'000

- ST Facebook stories , One week for each partner

Interaction with viewers, Engelberg/Pilatus/RhB, Summer in Switzerland, outdoor, Avg. weekly reach around 9'000

- Trail running event PUT - Trail running event in south of Poland, *PUT*- Pogorze Ultra Trail. Main prize for best man and woman: starting package in Engelberg, Sept. Online contest and online activities promoting event and Swiss run (SoMe). Maps and ST materials distributed during the event also in the starter package for each participant

- Cycling contest, [wysokieobcasy.pl](http://wysokieobcasy.pl)

7. - 16.07.: Cycling women campaign with our Olympic silver medalist Maja Wloszczowska and two cycling influencers @mambaOnbike and @MinistraKolarstwa

Activities by women´s portal [wysokieobcasy.pl](http://wysokieobcasy.pl)

Article where readers voted for 1 of 3 routes in Switzerland, which a team of 6 women will take  
Contest – win the trip and come with us

Activities by participants promoting the voting

1'500 participants voting, 400 contest participants

20. – 24.08. - cycling trip, Lake Route No. 9

- GTToS promotion with NGTraveler, Big Story on [national-geographic.pl](http://national-geographic.pl)

Promotion of GTToS and our eGuide

Display promotion on NG and NGT service and main page

SoMe promotion Facebook and Instagram of NGT and NG

Page views planned around 3'000'000

- Promotional activities with Camprest – portal for camping and caravanning fans. 5 articles about Grand Tour of Switzerland and other recommendations

Instagram and Facebook post and stories



Reach 570'000 so far

## KAM

- Invitation of 18 KAMs to STM in Geneva

## KMM

- Influencer trip by girls couple, 29.06 – 04.07. Swiss cities and trains as well as outdoor activities. A couple: @way.of.blonde and @maschinen

Instagram (reach 520'000, Instastories (611'000 impressions) and Tik Tok (276'000 views) during and shortly after the trip

- Influencer Trip by Marcin and Ada, 15. – 21.07.

2 influencers, a couple – Marcin @marcinkvcinski and Ada @a.lenarczyk

GToS, Swiss cities and outdoor activities, GToS application

Instagram, Tik Tok, posts and stories, Reach so far 250'000

- Influencer trip by Kamila Kalinczak, 14. – 20.08.

Journalist and influencer with 380'000 followers

Panoramic rides, GToS, Swiss cities, hiking

Instagram posts and stories during and after return

- Gazeta Wyborcza - publications after our trip GToS in May, Two articles with video content from the trip

[Ticket for a train which converts sometimes into a boat](#)

[Why locals and tourists love Switzerland](#)

Podcast on [wyborcza.pl](#):

[What is surprising in Switzerland](#)

Podcasts on [zloteprzeboje.pl](#):

[Dziennik z podróży](#)

## Future Activities

- *Madame Edith and Friends* trip, focus on autumn, September
- *Dzień Dobry TVN*, GToS, September
- STM Geneva, September



- 'Wysokie obcasy' women's magazine contest winner trip, September
- Promotion on GToS with *naTemat.pl*
- Autumn promotion in SoMe

## Interesting observations

Boom for traveling to Switzerland:-)



## 2. Active Markets

### SOUTH EAST ASIA

#### Market Situation

Despite increasing costs (Flight costs for year-end travel to Switzerland, due to limited capacity and higher fuel costs e.g. SQ / LX return economy ticket is priced at CHF 1600-2000. Inflation has tapered but remains elevated for 2023. SEA currencies MYR mainly but also IDR PHP THB VND have depreciated as CHF and USD strengthens), H1/2023 has shown a sustained growth in the travel demand from Southeast Asia to Switzerland, with a growth of 30% in overnight numbers compared to the same period in 2019.

Thailand is back to its first position, slower recovery and lowest growth, due to the fact that TH is already very mature and the travel trade quite saturated (CH has highest market share in west EU). ST will focus more on the FIT segment as it has more growth potential.

The quick recovery of Singapore triggered a snow ball effect with a strong revenge phenomenon. Japan the first revenge wave as it remained closed longer than Singapore. Hence, western Europe and Switzerland in particular became first choice destinations. Against expectation the positive growth trend lasts longer, although popular Asia destinations are now reopened.

Malaysia is now the fastest growing market in SEA, facilitated on the one hand that it is a visa free country and secondly, thanks to the awaking of the premium Malay (Muslim) consumers. Many luxury brands now target this segment specifically. This unlock a 60% of the population that was almost not catered by the traditional travel trade. MYR/CHF hit record low at 5.40. Switzerland is now an even more "premium" travel destination.

The demand from Indonesia is very strong and the premium ID consumers from Jakarta or Surabaya are willing to pay for luxury experiences. H1/23 growth of 10% is below the regional average and can be explained by the shortage of visa supply from all Schengen countries.

Indonesia presidential election campaigns are underway till Feb 2024. Media starts to feature political ads, crowding out other advertisers. Political uncertainty may temporarily dampen willingness to travel.

The Philippines is the smallest focus market with ST physical presence since October 22. The demand is here but the travel trade knowledge is still lacking. Switzerland is in some western Europe itineraries but with short stays. Spain, with religious travel products, is the most sought after western Europe destination. Looking as the large growth (H1/23=71% vs same period 19), the potential of this market doesn't need to be proven.

#### Best practice competitors

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.

Tokyo and other prefectures plan to increase tourist tax levied with the hotel accommodation as international visitors return in big numbers in 2023. Revenue collected goes towards tourism promotion and maintaining tourism infrastructure.

Korea NTO launched Challenge Korea campaign to boost Visit Korea Year 2023-24 to attract >30mio international visitors by 2027. Their campaign focus on 4 major themes, i.e. Dance, Food, Photo



Spots, Future.

## Campaigning & Activation

STS - Consistently push Excellence Program sign-ups with >150 contacts registered during numerous Trade Seminars in 2023.

STS - Establish new sales channels to push STP sales e.g. Uniworld TTC, WeBuy, BeMyGuest, Webbeds

TH - Reusing Family campaign's KOL Ladiiprang video content for Thailand's national mother day social media post trends, reach 6M

TH - KTC World promotions on Facebook & website for KTC Credit card users

## KAM

MY: B2C Presentation & Photo Booth at Easy Europe's event

STS - STP Newsletter to Trade 8 July

STS - Trade Seminar in Kota Kinabalu, Malaysia 12 July

STS - Trade Seminar in Singapore 18 July

STS - Presentation at Dynasty Travel Roadshow 16 July

STS - Agent Gathering in Kuala Lumpur, Malaysia 20 July

SEA - Trade webinar lifestyles topic 16 August, 252 unique attendees

TH - Swiss Products launch in alignment with KOL new Youtube episode

TH - KTC World new mono Swiss tour promotions targeting KTC Credit card users

TH - ST/STS/RE joint marketing workshop Bangkok, 10 August, Rails product sellers & Rail Europe's key accounts

## KMM

SG & MY: KMM Summer Campaign Media trip ' L'Officiel

STS - Advertorials in TTGmice print and TTG Asia digital for Aug/Sep 2023

TH - Article on Power Travellers, target audience KingPower duty free users

## Future Activities





MY: Collaborations with LX/SQ  
STS - roll banner distribution by Pinatlas to Bangkok trade  
STS - National Day greetings Newsletter to Trade 1 Aug  
STS - Trade Seminar in Bangkok 10Aug  
STS - Trade Seminar in Saigon 11Aug  
STS - Presentation at Dynasty Travel Roadshow 19 Aug  
STS - Sales calls to Jakarta 21-23Aug  
STS - Trade Seminar in Jakarta 22 Aug  
STS - Trade Seminar in Semarang 24Aug  
STS - Trade Seminar in Manila 23 Oct (proposed)  
KAM - 2nd webinar lifestyle content 27 SEP  
KAM - event in Bangkok, 27 SEP  
SEA - participation in STM 2023 with 37 buyers  
KAM - Fam trip collaborated with Heavens portfolio, luxury segment  
KMM - autumn media conference in Bangkok, 29 SEP  
C&A - Thai KOLs trip, gastronomy theme

### Interesting observations

STS - Total revenue from all STS product range has increased by staggering >200% for H1 2023 vs H1 2019, with rapid growth from PH (451%), MY (271%), SG (264%), ID (261%), TH (141%), despite visa challenges for PH ID TH markets.  
STS - Klook will unplug from RE booking system from Aug onwards. Klook contributes substantial % of RE revenue for SEA markets. RE is activating more GSAs to fill this gap.  
STS - JR Group announced increase of 50% for their regional passes from 1Oct 2023, ahead of Golden Week and Winter holidays. This follows the increase of up to 77% for their nationwide passes.  
TH - with the upcoming 2nd top high seasons in Thailand, visa shopping situation is monitored  
TH - CHF high exchange rate and its effect to traditional Group Thai travel agents' selling ability



## 2. Active Markets

### SPAIN

#### Campaigning & Activation

-**Sketching Basel with content creator Alicia Aradilla.** She has create an illustrated travel dairy showing the highlights of the city and has shared the experience in Instagram reaching 650'000 marketing contacts.

-**Influencers cities campaign.** Selection of three very different & wide-ranging profiles for St.Gallen, Winterthur and Zurich reaching a total of 5'340'281 marketing contacts.

-AMoS advertorial @ El Duende, a niche magazine for urbanites who love culture and design. Creation of a 7-page article in print and digital where the 10 AMoS have been integrated & complemented in the magazine's SoMe channels and an exclusive NL reaching a total of 250'000 contacts.

### KMM

#### Mediatrips

Grupo Vocento

TV3 Mediatrip to Grindelwald, 07.-09.07.2023

RACE Autoclub Mediatrip to Fribourg Region and Schilthorn/Mürren, 03.-13.07.2023

Solo Aventura to Aletsch Arena, 12.-16.07.2023

Barcelonautes TV/Miradas Viajeras Movistar to Bern and Fribourg Region, 20.-30.07.2023

Grupo Vocento to Zurich, 02.-04.07.2023

Bilbao Mediatrip with El Correo and La Ria del Ocio to Zurich, 13.-16.07.2023

El Pais Semanal to Davos, 17.-21.07.2023

RAC1 Radio and ARA.cat to Fribourg Region, 22.-27.08.2023

#### Top coverage

TVE, Aquí la tierra "Chocolatería artesanal en Gruyères", 1'000'000 viewers

TVE, Aquí la tierra "Granja en Albeuve y fondue al aire libre", 1'000'000 viewers

Elpais.com, "En la garganta del diablo verde", 1'919'250 online contacts

El País Semanal, "En la garganta del diablo verde", 579'232 contacts

Oxígeno.com, "Este verano, refréscate en Suiza", 137'500 online contacts

Lavanguardia.com, "Así es la Maison Blanche" 1'594'000 online contacts

ABC.es, "Un nuevo teleférico que conecta Suiza e Italia a través de los Alpes", 1'292'233 online



contacts

La Vanguardia Magazine, "Blanco Le Corbusier", 323'099 contacts

Elpais.com, "Davos no quiere que sepas dónde vivió Kirchner", 1'919'250 online contacts

El País Semanal, "Davos no quiere que sepas dónde vivió Kirchner", 579'232 contacts

Crónica Vasca El Español, "Zúrich, un millón de motivos", 328'000 online contacts

Lugares de Aventura, "Suiza en familia. La nueva guía imprescindible para explorar Suiza.", 450'000 online contacts

Larazon.com, "El teleférico más alto de Europa une Suiza e Italia cruzando los Alpes sin tocar el suelo", 20'000 online contacts

Viajesnationalgeographic, "El lago de las mujeres ciclistas", 417'601 online contacts

**Total media contacts: 11'559'397**