Key Partner Meeting Extended 06. / 07. November

Opening 6. November 2023

Buffet & Bar

Welcome

Corinne Genoud, Head of Markets West

Florian Rötheli, Head of Content & Partner Marketing

Lake Zurich, Zürich © Christine Benz

Joining + Forces

Our objectives for today.

Switzerland.

KPM Extended - Program

Switzerland.

Monday Nov 6 – Focus Marketing

09:45 - 10:45 Opening
11:15 - 12:15 Marketing Sessions
Lunch
13:30 - 14:30 Marketing Sessions
14:45 - 15:45 Marketing Sessions

Apéro with Markets

16:00 - 17:00 Additional WEURO25 session for host cities

Tuesday Nov 7 – Focus Markets

From 08:00 Welcome Café

8:30 - 11:40 1:1 Meetings

11:40 - 13:10 Lunchbreak and 1:1 Meetings

13:10 - 16:20 1:1 Meetings and open sessions

* Early departure VSTM Management Seminar participants (Interlaken)

MySwitzerland Pro, Touring Teams, Markets are also in the Stadthalle

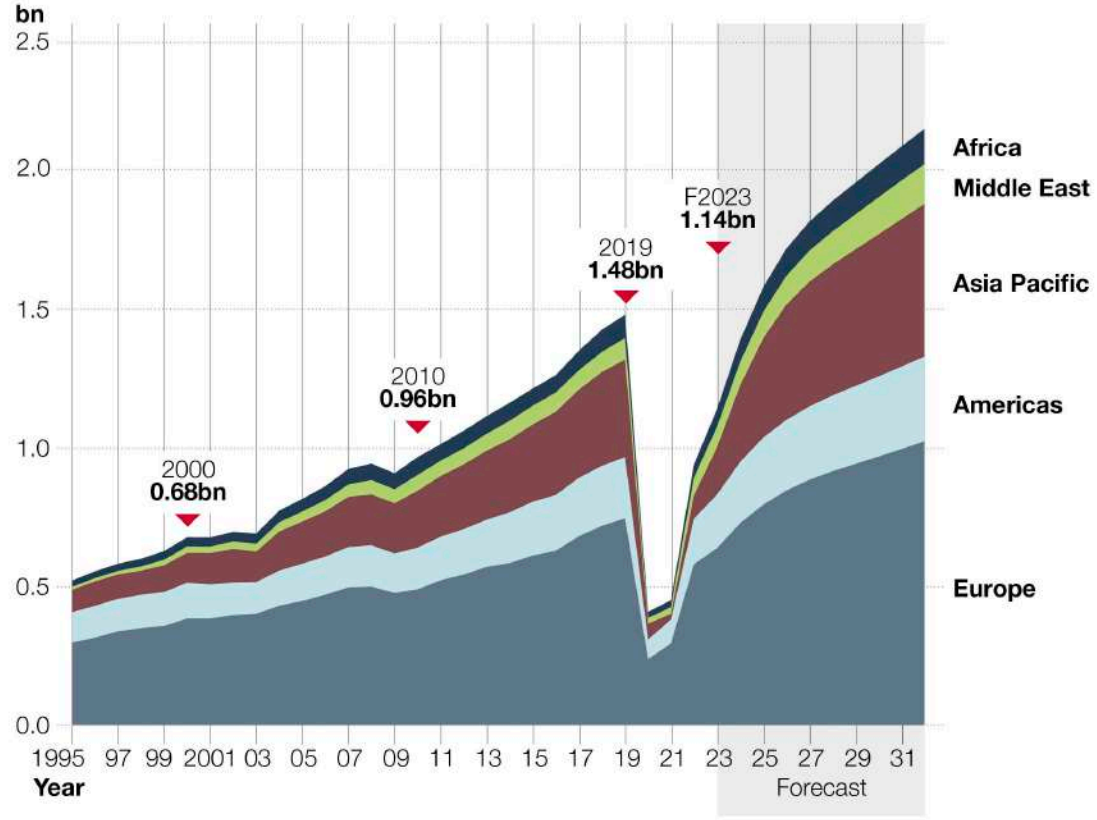
ST Strategy 2024 - 2026.

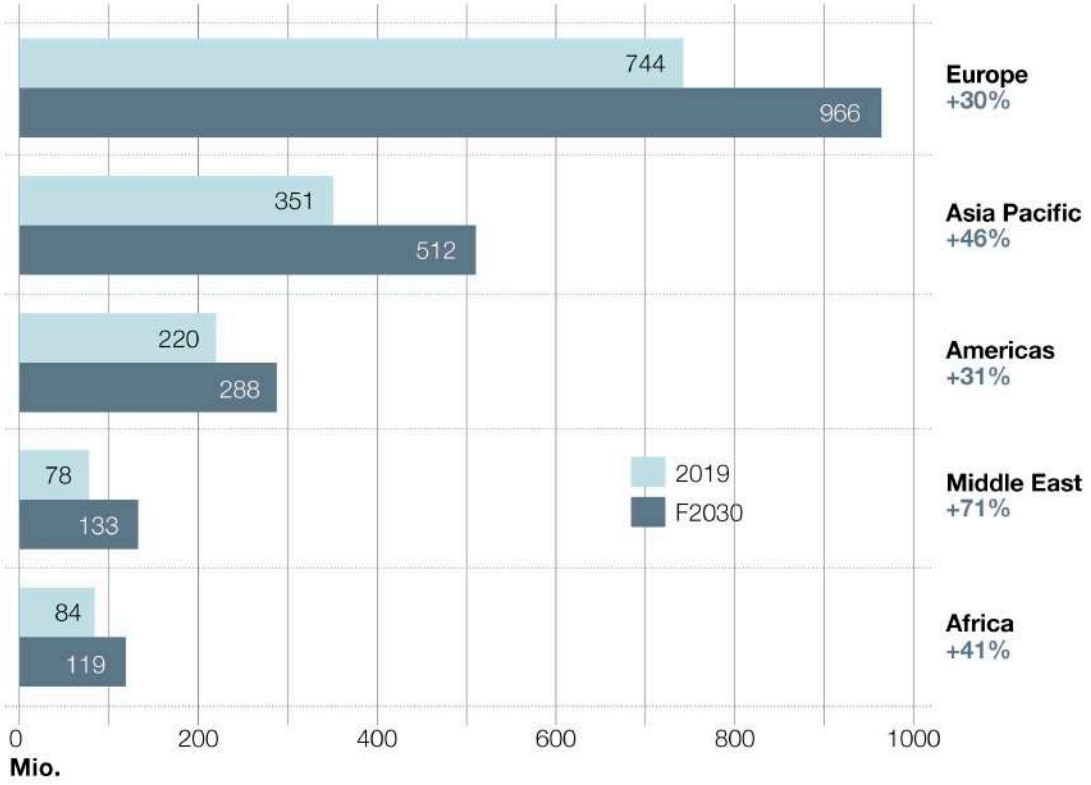
Martin Nydegger.

Tourism development worldwide.

Switzerland.

Arrivals in international tourism





Tourism outlook by BAK Economics.

Schweiz.

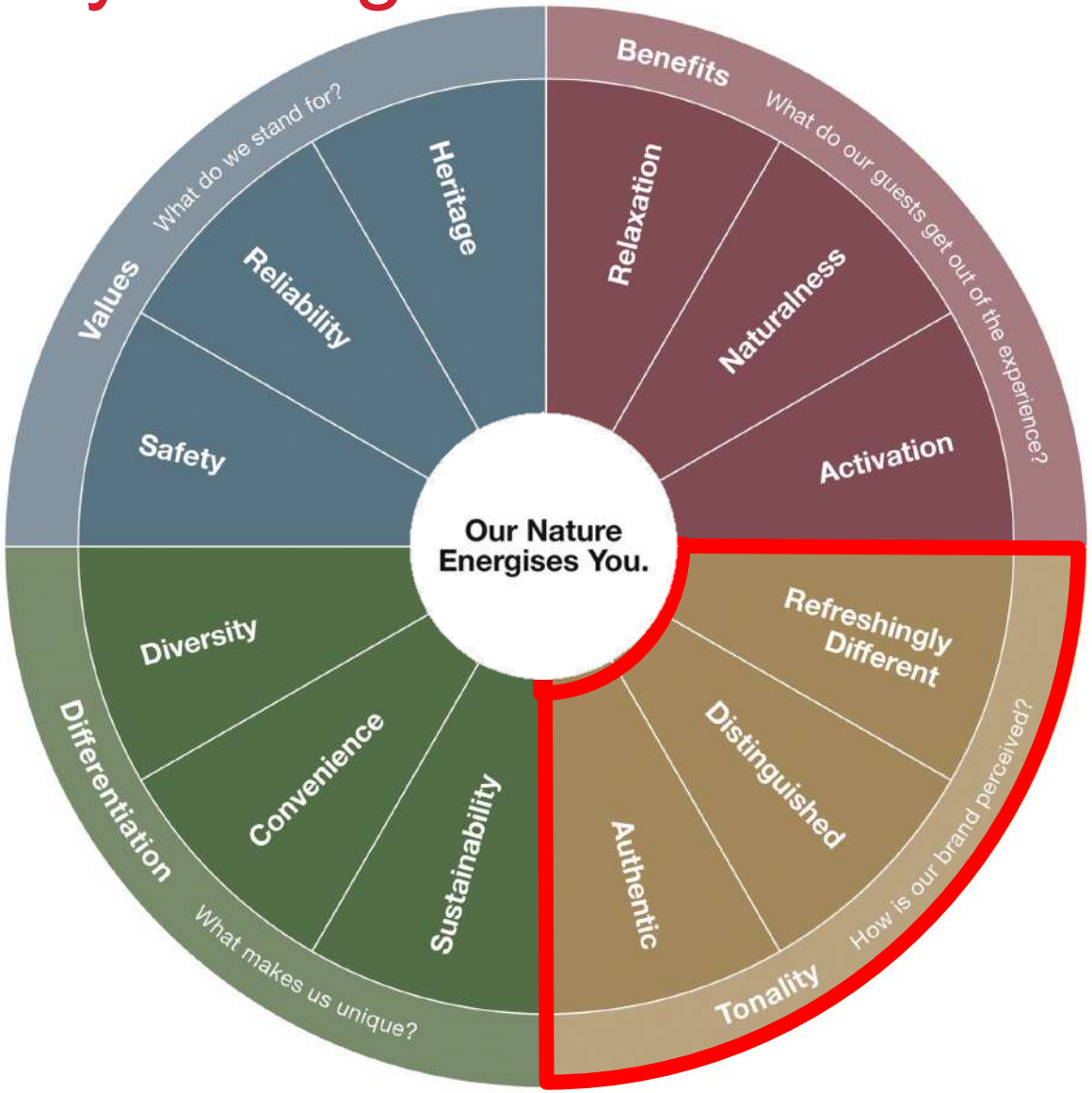
Entwicklung der Logiernächte nach Herkunft und Tourismusjahr

	2020		2021		2022		2023		2024		2025	
Total	26'357	-33.1%	27'804	5.5%	37'217	33.9%	40'918	9.9%	41'149	0.6%	41'557	1.0%
Schweiz	16'905	-5.0%	20'275	19.9%	20'942	3.3%	20'542	-1.9%	20'026	-2.5%	19'840	-0.9%
Ausland	9'451	-56.2%	7'528	-20.3%	16'275	116.2%	20'376	25.2%	21'123	3.7%	21'717	2.8%
Europa	6'899	-41.0%	5'991	-13.2%	10'419	73.9%	11'657	11.9%	11'471	-1.6%	11'309	-1.4%
Deutschland	2'579	-34.3%	2'360	-8.5%	3'543	50.1%	3'748	5.8%	3'711	-1.0%	3'668	-1.2%
Frankreich	892	-30.3%	898	0.6%	1'287	43.4%	1'384	7.5%	1'324	-4.3%	1'288	-2.7%
Italien	553	-38.6%	475	-14.1%	778	63.7%	861	10.7%	857	-0.6%	839	-2.1%
UK	697	-57.6%	264	-62.2%	1'255	376.3%	1'658	32.1%	1'632	-1.5%	1'603	-1.8%
Fernmärkte	2'553	-74.2%	1'537	-39.8%	5'856	280.9%	8'719	48.9%	9'652	10.7%	10'408	7.8%
USA	642	-73.7%	480	-25.3%	2'149	348.0%	2'948	37.1%	2'800	-5.0%	2'873	2.6%
China	303	-80.8%	36	-88.0%	140	285.6%	541	286.1%	1'096	102.7%	1'359	24.0%

I need a holiday.
I need Switzerland.

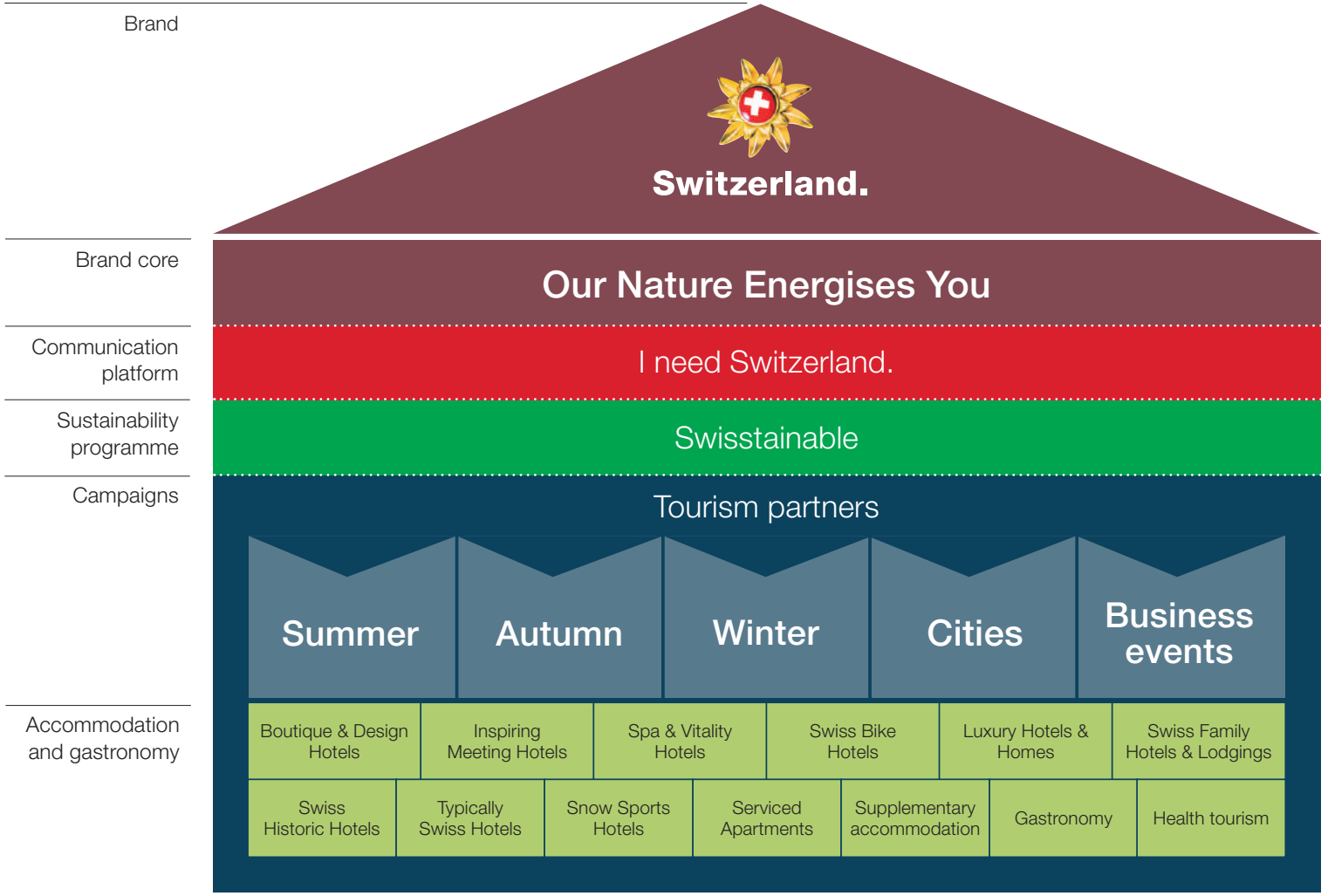
We continuously strengthen our Value Proposition...

Switzerland.



… with a clear Communication Framework…

Switzerland.



… to create more impact with our target guests.

Switzerland.

LOU
DOWN PACER 16%

Top Ziele beim Reisen
Erholung, Verwöhnung, Zeit in der Natur verbringen, authentische Erlebnisse, neue Dinge entdecken

Top 3 Märkte
Deutschland, Schweiz, BeNeLux

JO
ACTIVE ADVENTURER 12%

Top Ziele beim Reisen
Zeit in der Natur verbringen, intensiv Sport treiben, an Aktivitäten teilnehmen, aussergewöhnliche Erlebnisse

Top 3 Märkte
Indien, USA, BeNeLux

MAX
HIGHLIGHT TRAVELLER 18%

Top Ziele beim Reisen
So viel wie möglich sehen, neue Dinge entdecken, Top-Sehenswürdigkeiten erkunden, authentische Erlebnisse, an Aktivitäten teilnehmen

Top 3 Märkte
Italien, UK, BeNeLux

KRIS
LOCAL EXPLORER 24%

Top Ziele beim Reise
Authentische Erlebnisse, neue Dinge entdecken, aussergewöhnliche Erlebnisse, intellektuelle Stimulation, an Aktivitäten teilnehmen

Top 3 Märkte
Frankreich, Italien, USA

QUINN
PLEASURE SEEKER 12%

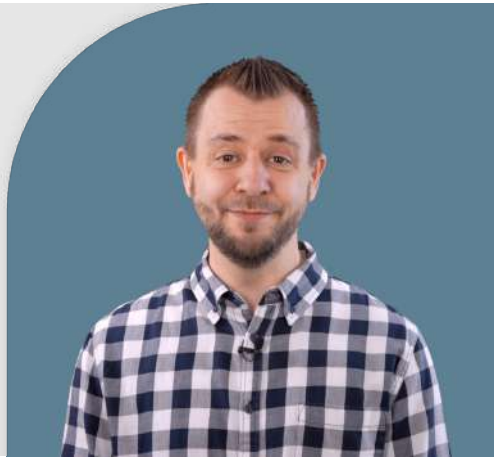
Top Ziele beim Reisen
Shopping, Exklusive Erlebnisse, Verwöhnung, Erholung, Top Sehenswürdigkeiten entdecken

Top 3 Märkte
Indien, GCC, USA

PAT
BONDING EDUCATOR 12%

Top Ziele beim Reisen
Bindung zu Mitreisenden stärken, bereichernde Erlebnisse bieten, Erholung, authentische Erfahrungen, neue Dinge erleben

Top 3 Märkte
Schweiz, UK, Deutschland, BeNeLux



We accompany our guests with our activities along the customer journey.

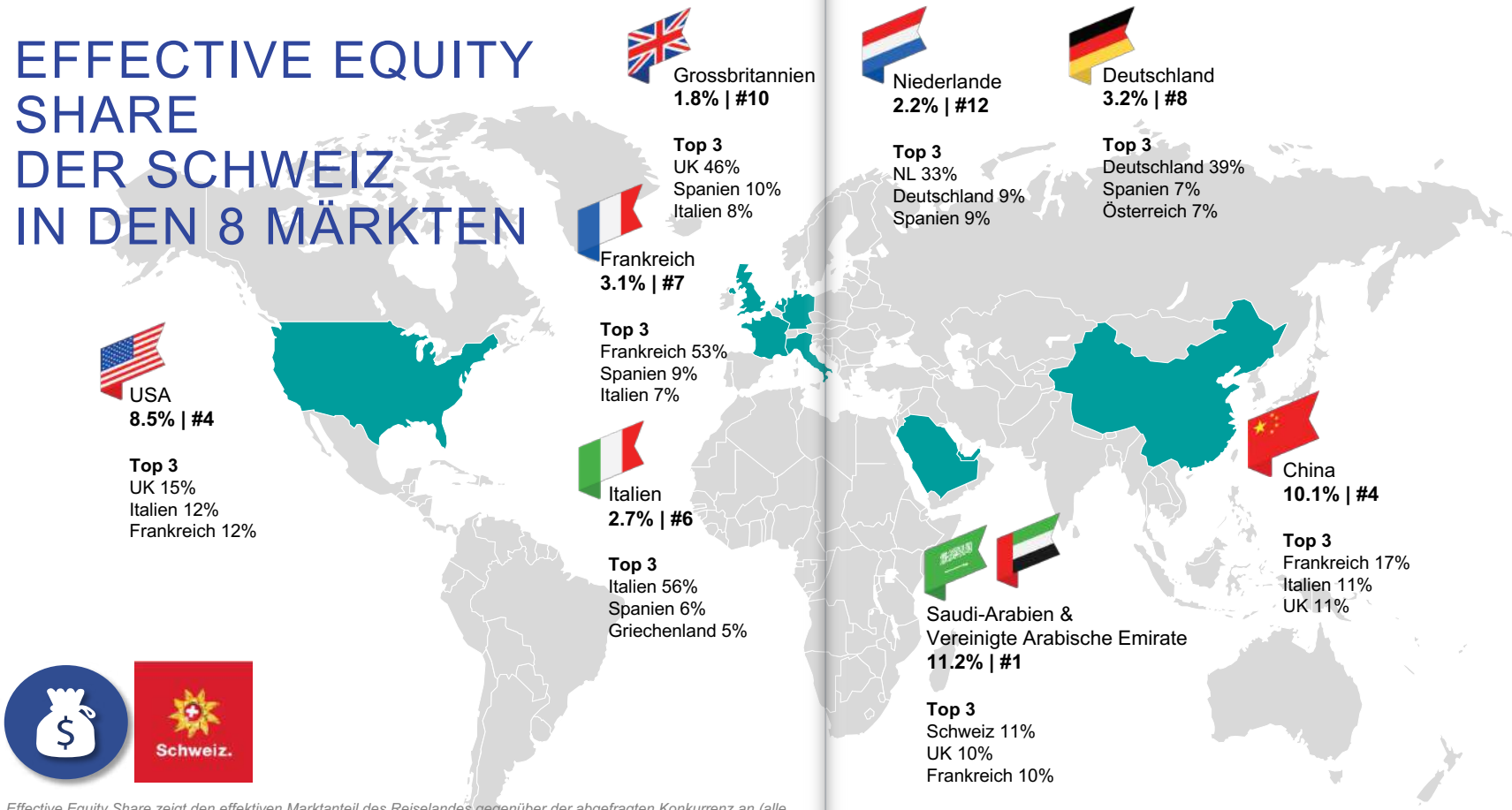
Switzerland.

Focus of our activities

BEM 2023 – We measure our progress.

Switzerland.

EFFECTIVE EQUITY SHARE DER SCHWEIZ IN DEN 8 MÄRKTEN



Grossbritannien
1.8% | #10

Top 3
UK 46%
Spanien 10%
Italien 8%

Niederlande
2.2% | #12

Top 3
NL 33%
Deutschland 9%
Spanien 9%

Deutschland
3.2% | #8

Top 3
Deutschland 39%
Spanien 7%
Österreich 7%

Frankreich
3.1% | #7

Top 3
Frankreich 53%
Spanien 9%
Italien 7%

USA
8.5% | #4

Top 3
UK 15%
Italien 12%
Frankreich 12%

Italien
2.7% | #6

Top 3
Italien 56%
Spanien 6%
Griechenland 5%

China
10.1% | #4

Top 3
Frankreich 17%
Italien 11%
UK 11%

Saudi-Arabien &
Vereinigte Arabische Emirate
11.2% | #1

Top 3
Schweiz 11%
UK 10%
Frankreich 10%

Schweiz.

Effective Equity Share zeigt den effektiven Marktanteil des Reiselandes gegenüber der abgefragten Konkurrenz an (alle Reiseländer zusammen ergeben 100% Marktanteil). Der Wert besteht aus dem Anteil an Brand Desire (Emotionalen Verlangen nach einem Land) +/- den Markteffekten (welche die Wahrscheinlichkeit des Aufenthalts im Land erhöhen oder verringern). | # = Rang des Reiselandes Schweiz im Vergleich der 24 europäischen Länder.

Ipsos

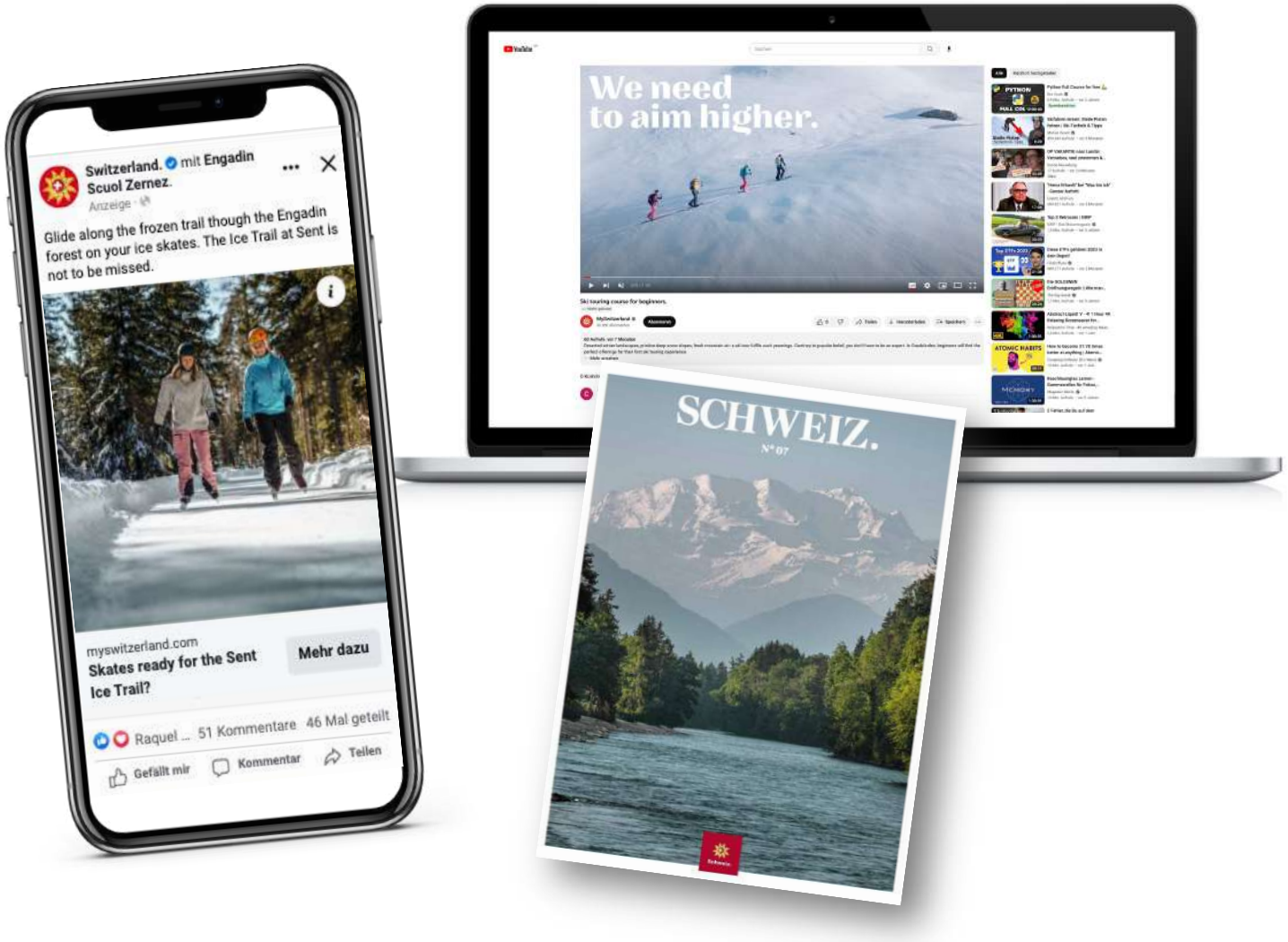
Always-on base noise on Social Media.

Switzerland.

Highlights Central Partner Campaign 2023.

Winter 2022/23, Summer, City & Autumn 2023.

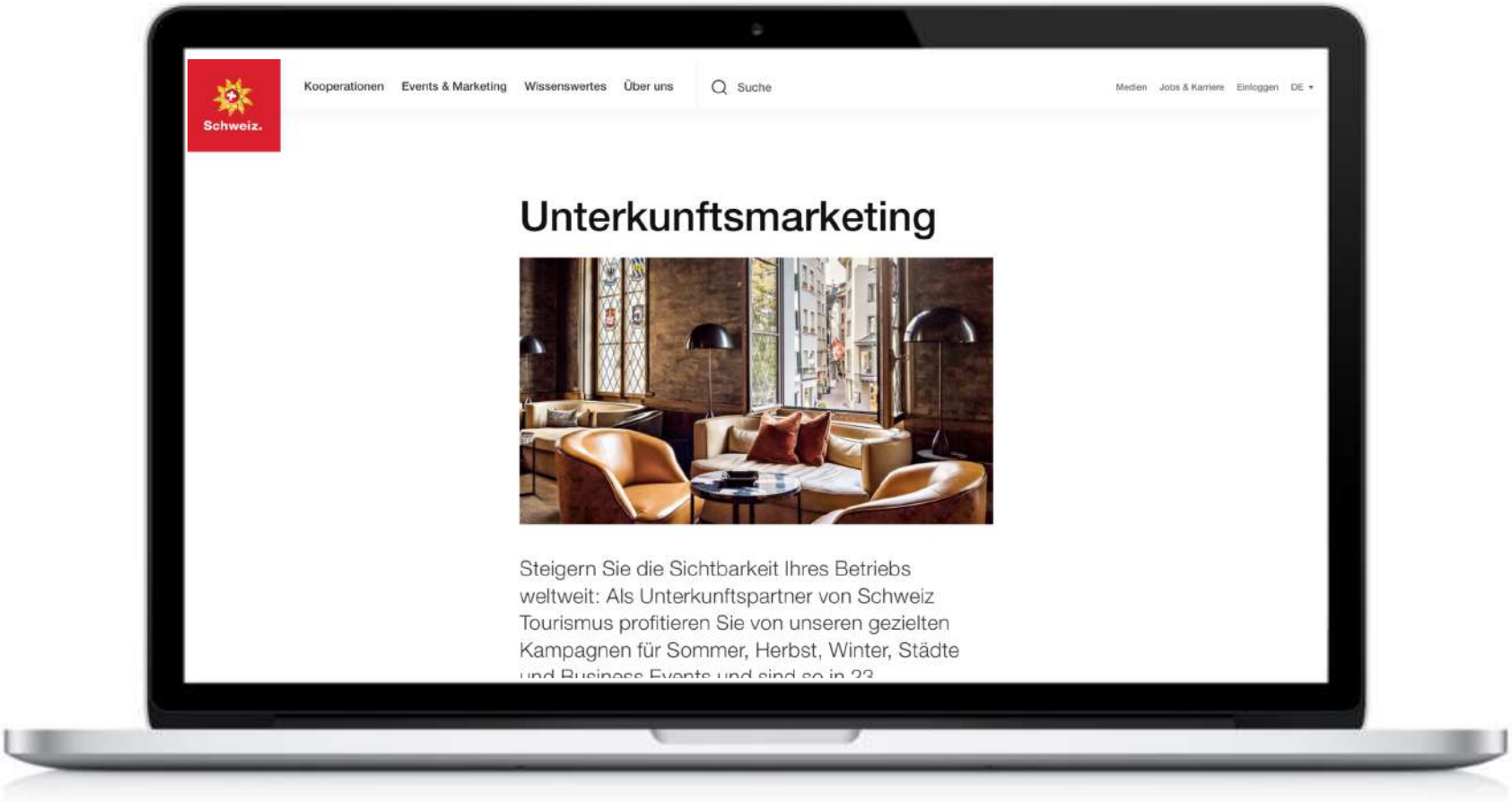
Switzerland.



- **Potentially biggest ST Campaign**
- 60 Partner (>75% Swisstainable)
- > 3.5 Mio. Partnerinvestment
- > 100 Content Items
- > 316 Mio. Impressions
- > 15 Mio. Youtube Video Views
- > 3.6 Mio. clicks
- 600'000 Magazines

Highlights Accomodation Campaign 2023.

Switzerland.



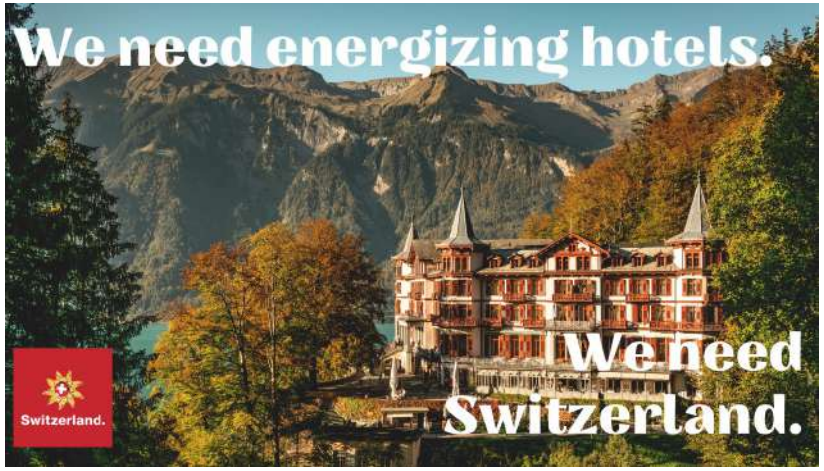
- 9 Accomodation Cooperations
- +740 Partner (>60% Swisstainable)
- > 2.5 Mio. Partner Investment
- > 290 Mio. Impressionen
- > 3.5 Mio. Link Clicks
- +8% above average ON growth

Four Main Campaigns in 2024.

Switzerland.

Four additional topic-specific campaigns.

Switzerland.



WiP

3-Year Plan.

Switzerland.

Touring | Autumn | Summer | Winter | SCIB

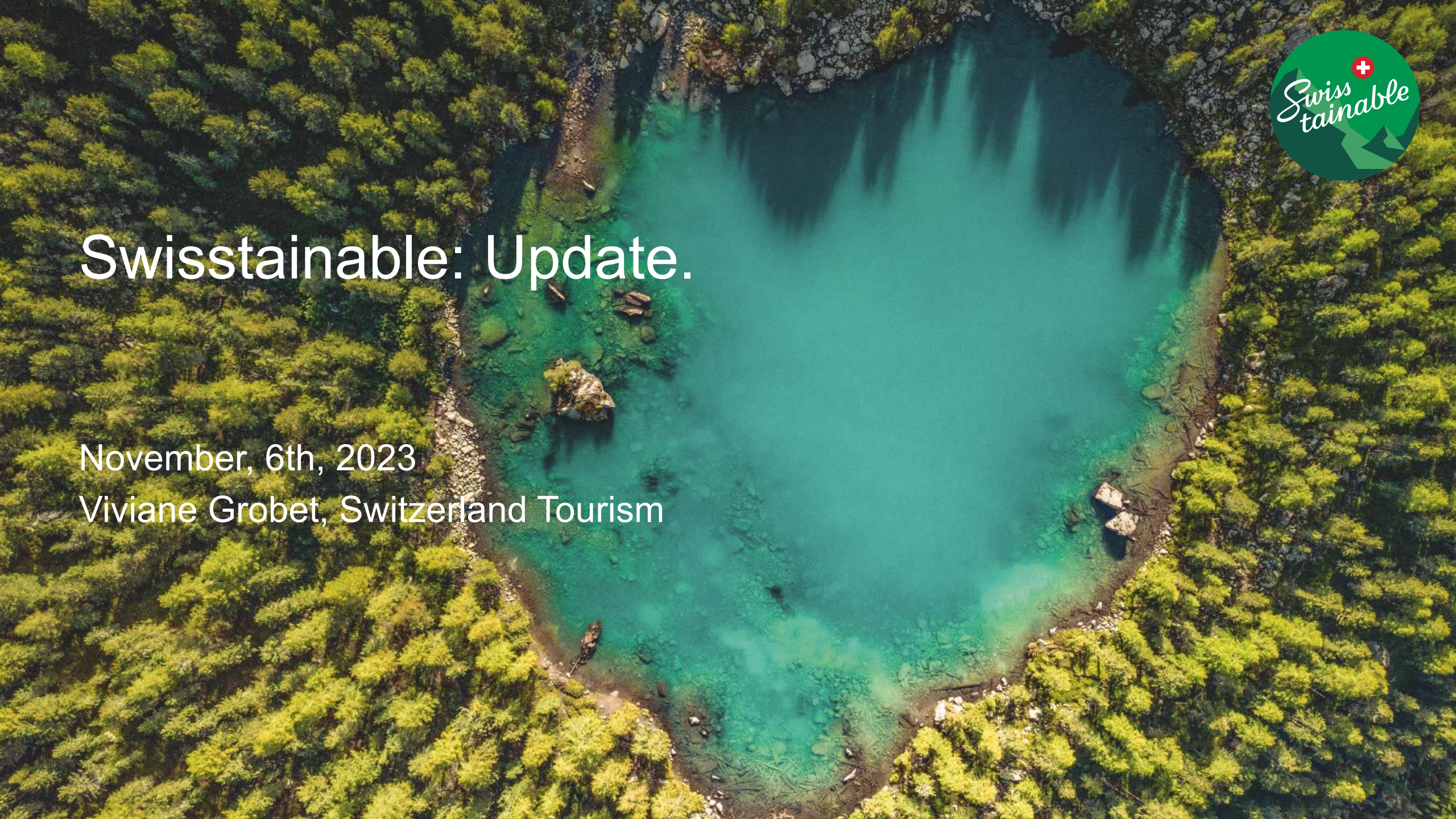
	2024	2025	2026
Roger Federer	RF Autumn (+ Grape Escape) • Kris, Lou • Europe	RF Autumn 2.0 • Lou, Pat • Europe	RF tbd
Swisstainable	Swisstainable Schweiz+ • Lou, Pat • CH	Swisstainable • Kris, Max • Europe	Swisstainable tbd
SCIB Bleisure	SCIB Bleisure • Persona tbd + Long Haul Markets	SCIB tbd	tbd
Paid-Media Always-on Campaign	Always-ontb • Continuous brand presence • Markets tbd		
Accom. Campaign	Umbrella Hotel Cooperation Campaign • Personas tbd • Markets tbd	tbd	tbd
Specials	Grape Escapes, BAK, AMoS	WEURO 2025, AMoS	Persona specific campaign with DMOs

Hypothesis Persona
- Quinn will be covered by Accomodation - and Gastronomy-Campaigns as well as market activities

1
Value Proposition

2
Endurance

3
Joint Forces



Swisstainable: Update.

November, 6th, 2023

Viviane Grobet, Switzerland Tourism

Swiss tainable
The most sustainable travel destination in the world.

Sustainable tourism
Minimise the environmental impact
and maximise the social and economic benefits
for the local communities.
Crestasee, Graubünden © Dominik Kobler

Communication
Partner programme
Length of stay
Visitor streams
All-year tourism
Swiss tainable

48%
Swiss tainable committed
12%
Swiss tainable engaged
10%
Swiss tainable leading
2.376

Swiss tainable Destination committed
Swiss tainable Destination engaged
Swiss tainable Destination leading
Surselva
THIS IS BASEL
Engadin Scuol Zernez
Biosfera Val Müstair

How to promote sustainability in your destination.

Switzerland.

Swisstainable – Schweizer Nachhaltigkeitsprogramm
2.541 Follower:innen
5 Monate •

#News Studierende der ZHAW Zurich University of Applied Sciences begleiteten rund 30 touristische Betriebe in der Surselva durch den #Swisstainable-Anmeldeprozess. Studentin Anina Dürig etwa k ... mehr anzeigen

Übersetzung anzeigen

Nachhaltigkeitsprojekt für Zürcher Hotels

Zürich Tourismus unterstützt Partnerhotels bei der Zertifizierung.

Übernehmen Sie Verantwortung!

Um zu einer nachhaltigen Destinationsentwicklung beizutragen, unterstützt Zürich Tourismus die CityTax zahlenden Betriebe der Subregion Zürich und Zürichsee mit der Übernahme von 80% der Kosten einer Nachhaltigkeitszertifizierung. Betriebe, die bereits zertifiziert sind, können für Jahresgebühren, Weiterbildungen im Bereich Nachhaltigkeit oder Massnahmen Unterstützungsbeiträge beantragen.

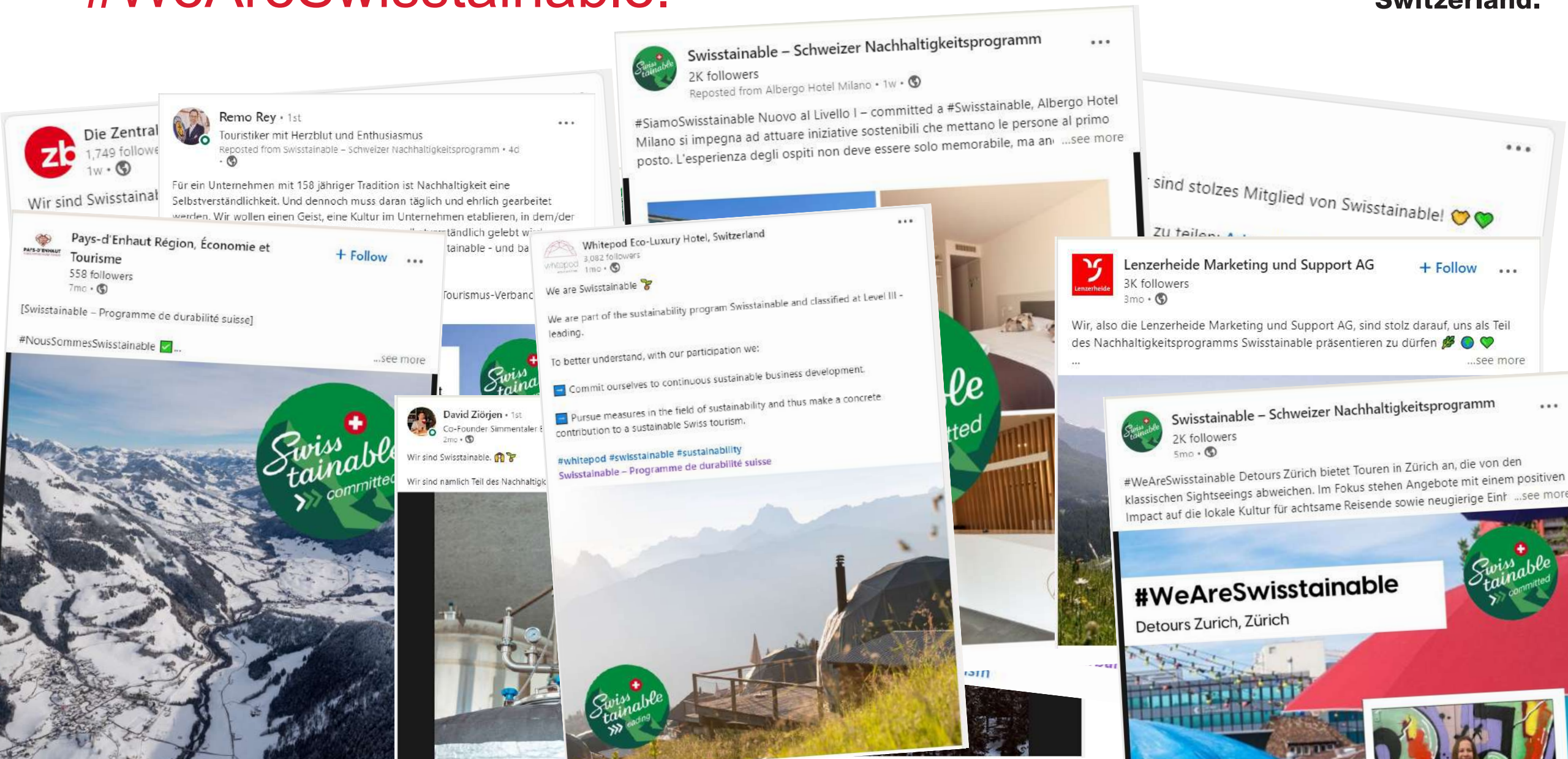
So unterstützen wir Ihren Betrieb
Fact Sheet
Zum PDF ↗

Jetzt Unterstützung anfordern
Anmeldung
Zum Formular →

Lernen Sie Nachhaltigkeitsprojekte in Zürich kennen
Inspiration
Zu den Tipps ↗

#WeAreSwisstainable.

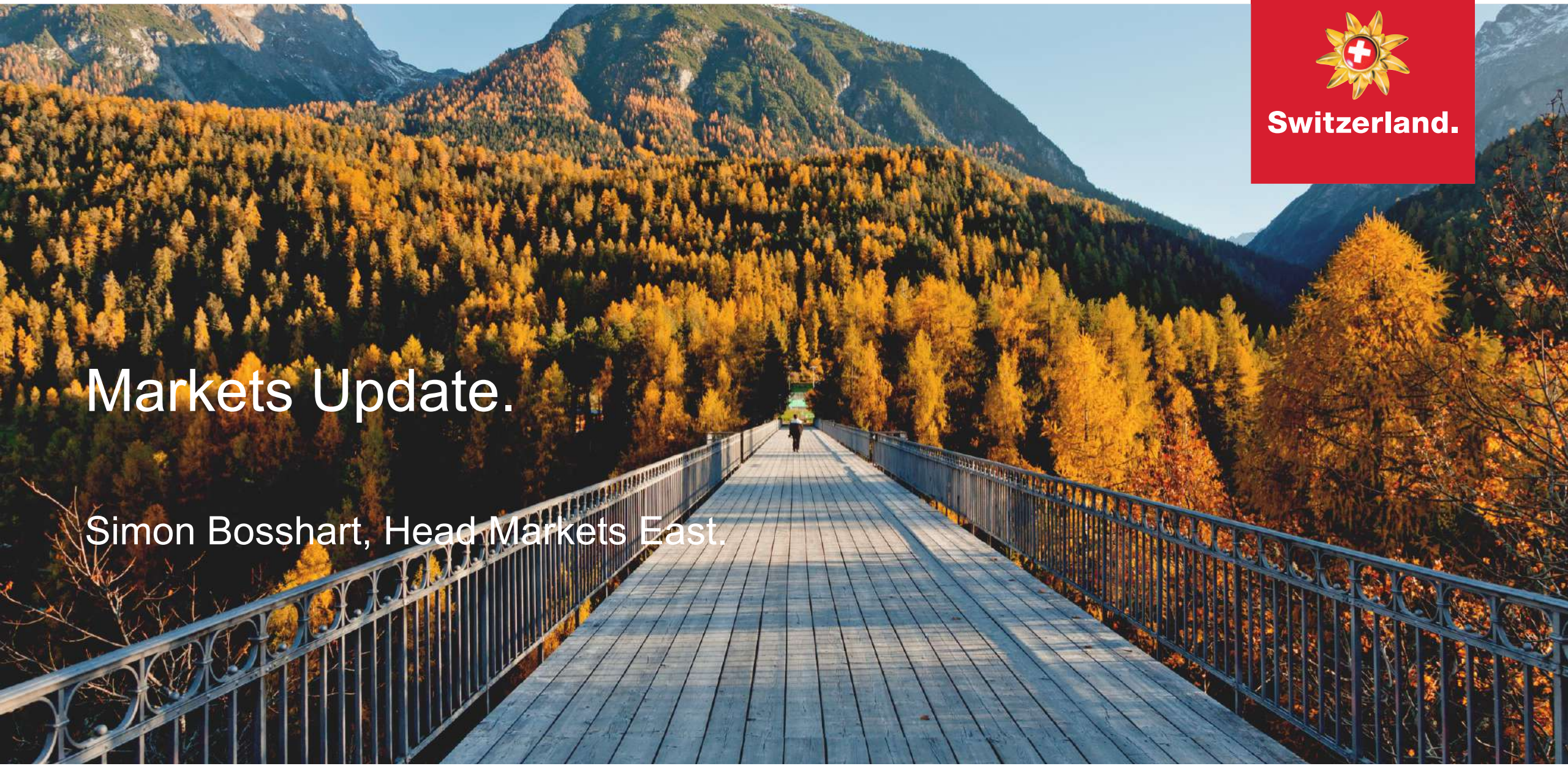
Switzerland.



Share your good practice examples with us.

Are you working on an exciting sustainability project in your company or in your destination that is worth mentioning? Or are you implementing unique measures in the area of environmental, economic or social sustainability? Let us know!

Thank you for spreading the Swiss tainable word.

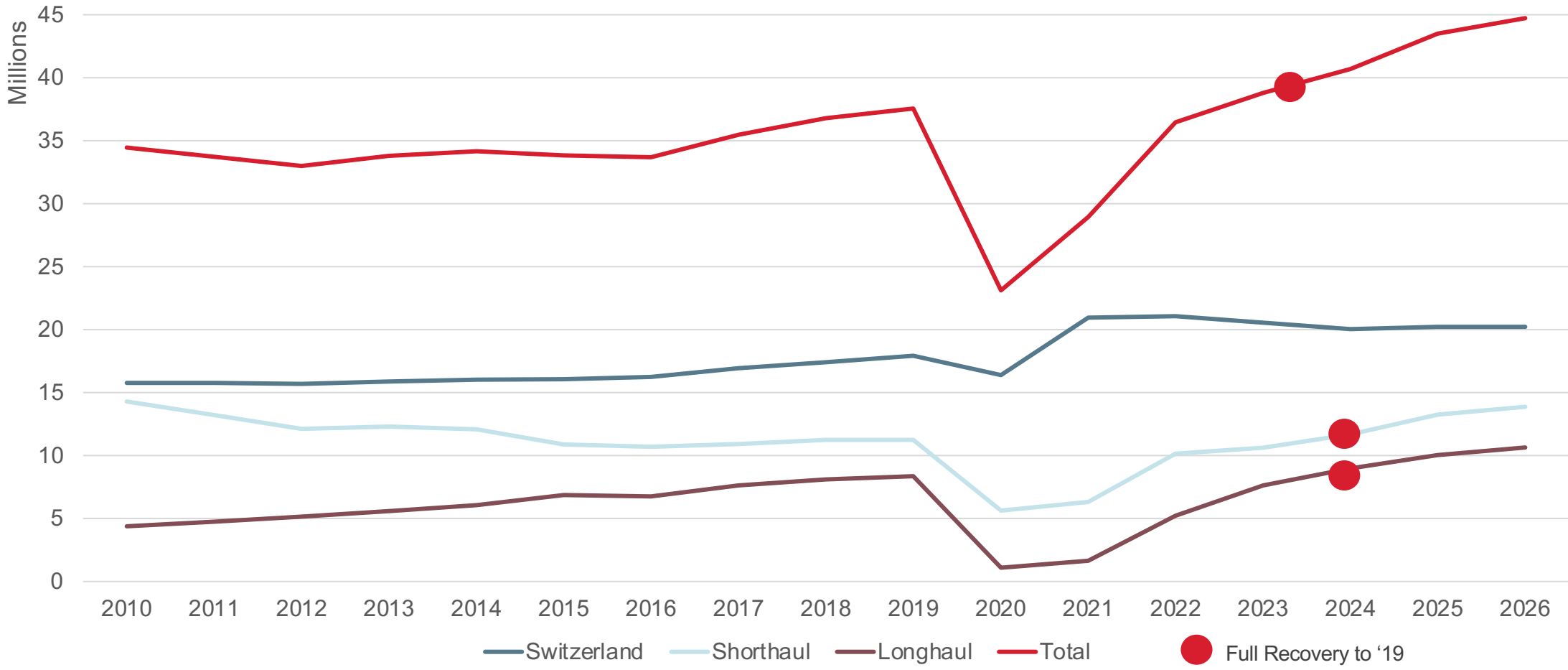


Markets Update.

Simon Bosshart, Head Markets East.

Overnight Development 2010 – 2026.

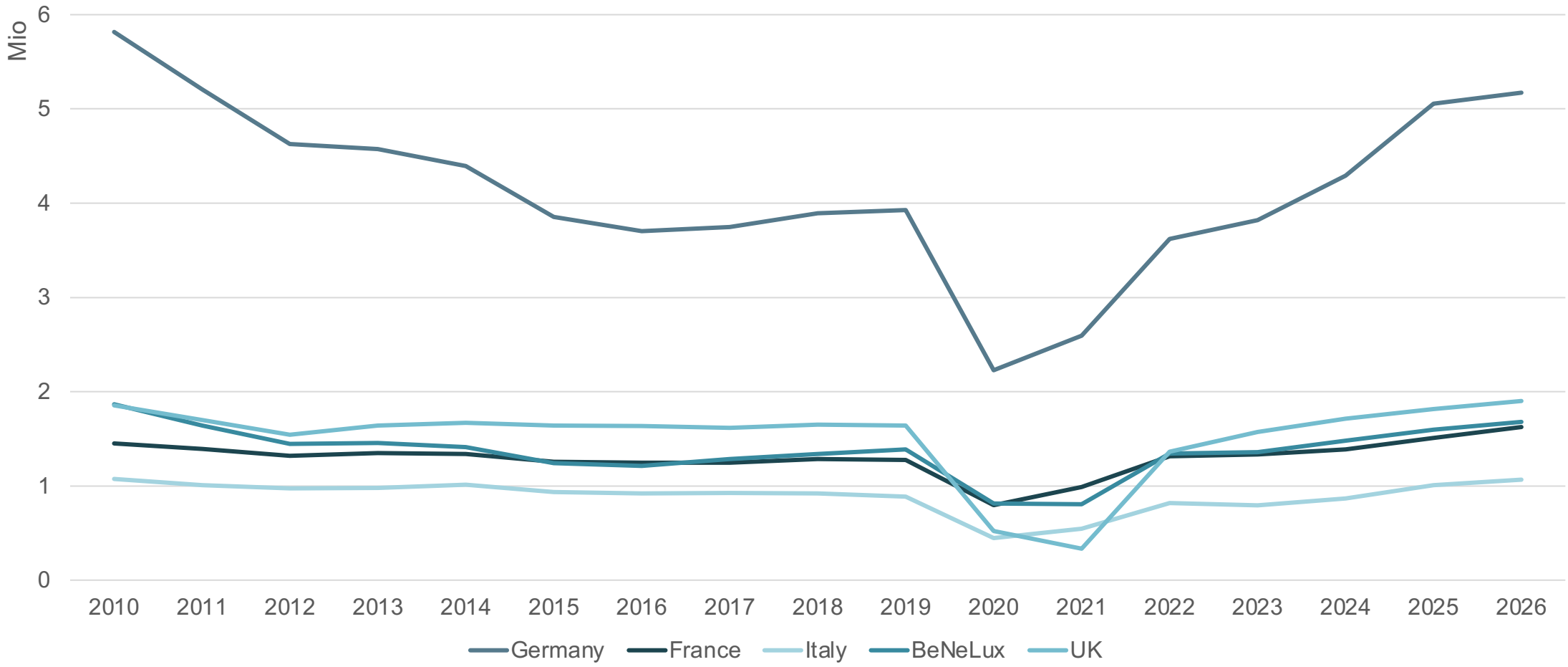
Switzerland.



Source: Oxford Economics, ST estimation (Status 11.08.2023)

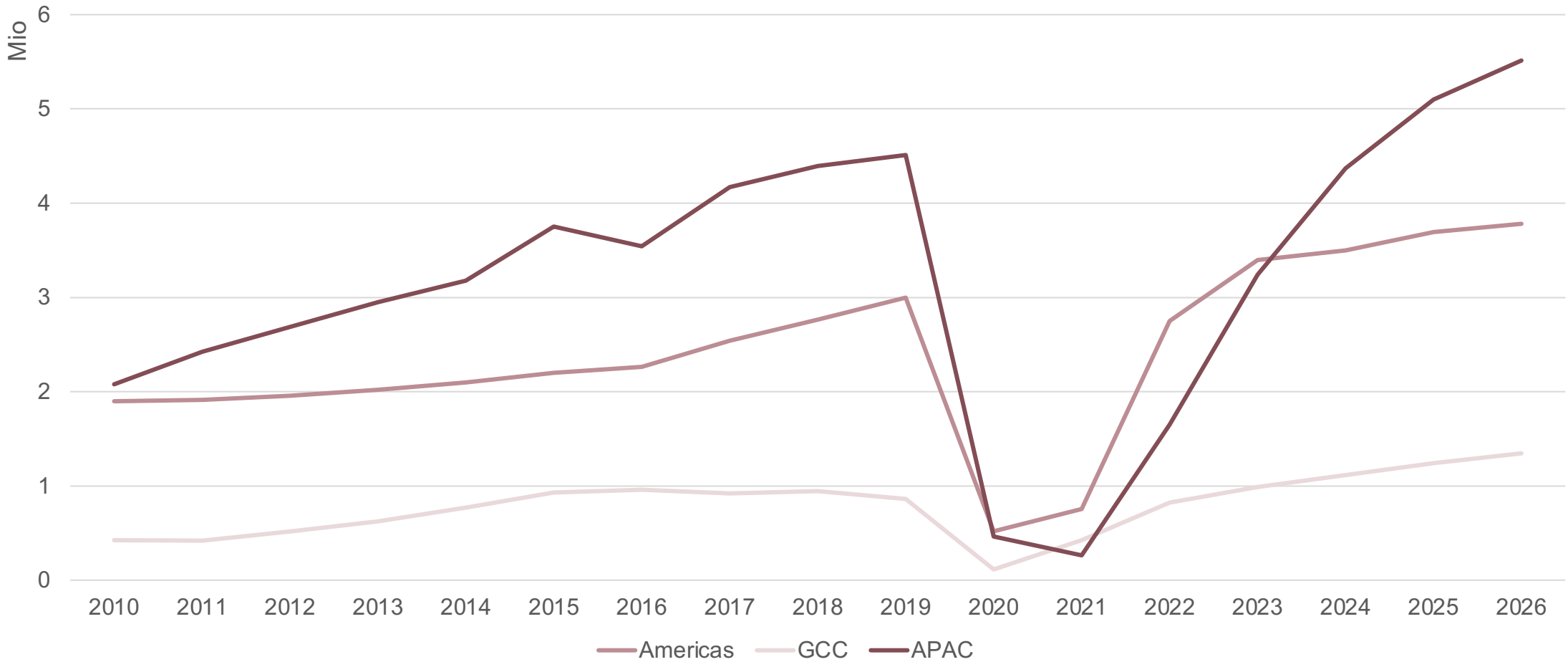
Overnight Development 2010 – 2026. Shorthaul Markets.

Switzerland.



Source: Oxford Economics, ST estimation (Status 11.08.2023)

Overnight Development 2010 – 2026, Longhaul Markets.



Source: Oxford Economics, ST estimation (Status 11.08.2023)

Our Market Strategy.

Switzerland.

Overseas.

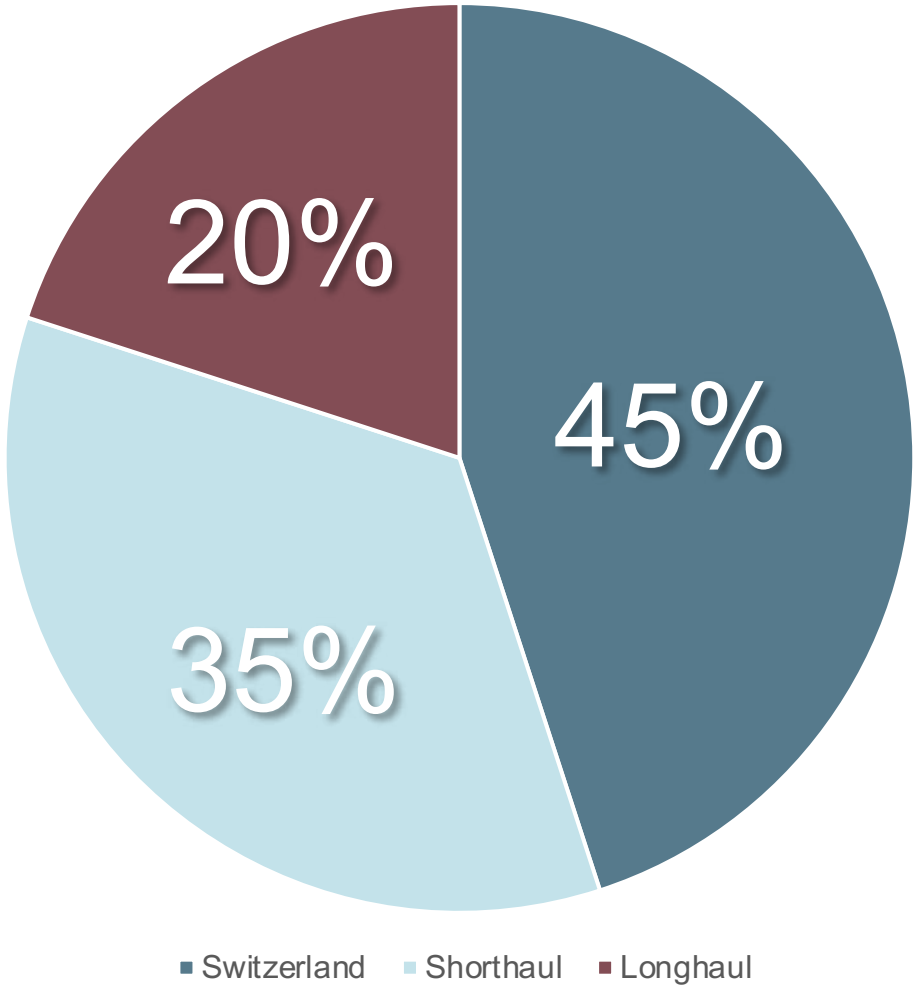
Steering before Growth

Focus: extension length of stay, public transportation, individual travelers and small groups, Swisstainable.

Europe.

Growth before Steering

Focus: Growth through new guests, esp. younger target groups, Swisstainable



Switzerland.

Growth and Steering

Focus: Diversity of Switzerland, emotional story telling, hidden gems, Swisstainable

Tempo di piaceri

L'autunno è la stagione delle escursioni. Ma è anche un periodo perfetto soprattutto

oe24 REISE LUST

LOGIN

E-PAPER Reiselust

EICH EUROPA WELT AKTIVURLAUB REISEN MIT KINDERN REISETIPPS HOTEL TIPPS

HEMA GLÜCKSMOMENTE NACHHALTIGES ÖSTERREICH GRILLMEISTER XXXLUTZ UNSERE TIERE SCHWEIZER HERBST

ENTGELTLICHE EINSCHALTUNG

4.TV > SCHWEIZER HERBST

gust 2023 | 13:47 Uhr
Min

Schweizer Herbst

الوجهة المثالية للسفر الملاجي

THE TRAVEL JUNCTION
BY FLIGHT CENTRE TRAVEL GROUP

Digital Management Update.

Stefan Künzle, Chief Digital Officer

MySwitzerland.com – Actual and Future.

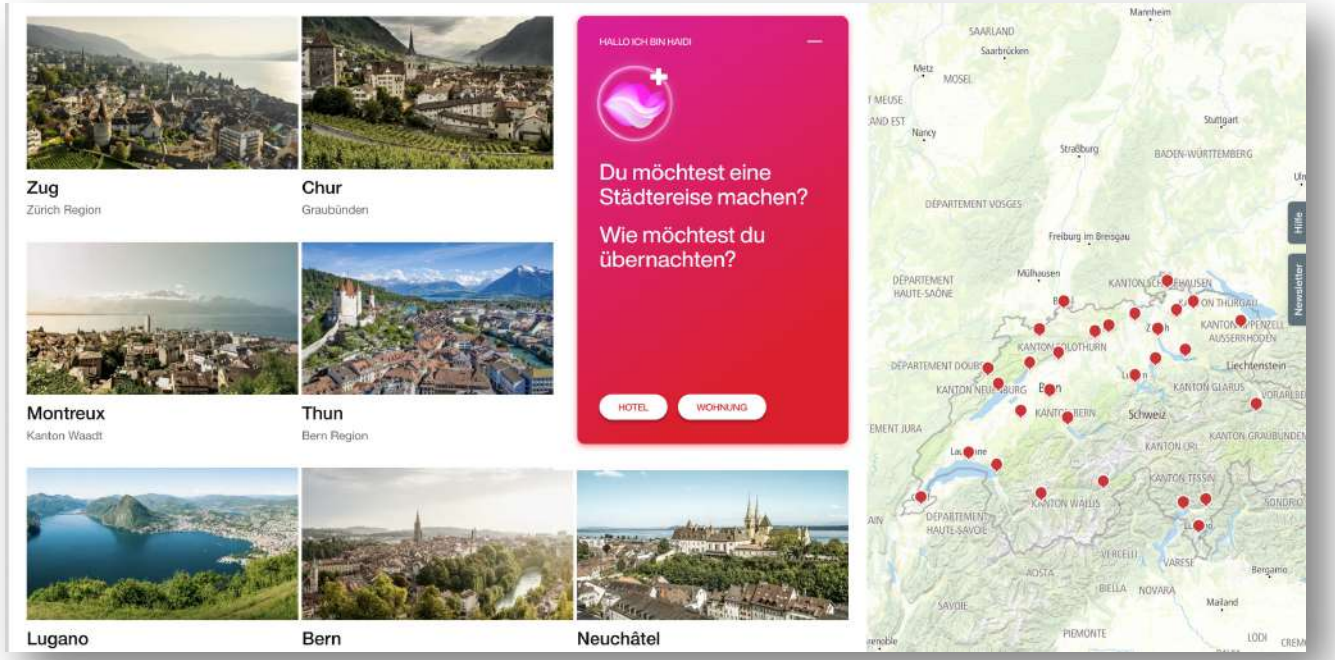
Switzerland.

MySwitzerland.com registers **43.8 Mio** sessions YTD facing a new record year.

The Engagement Rate is at **55.3 %.**

With 110’000 additional subscribers, the newsletter sees a 40% growth.

MySwitzerland goes AI.
Organic integration of Conversational AI on MySwitzerland.com, considering user intention and incorporating real time information.



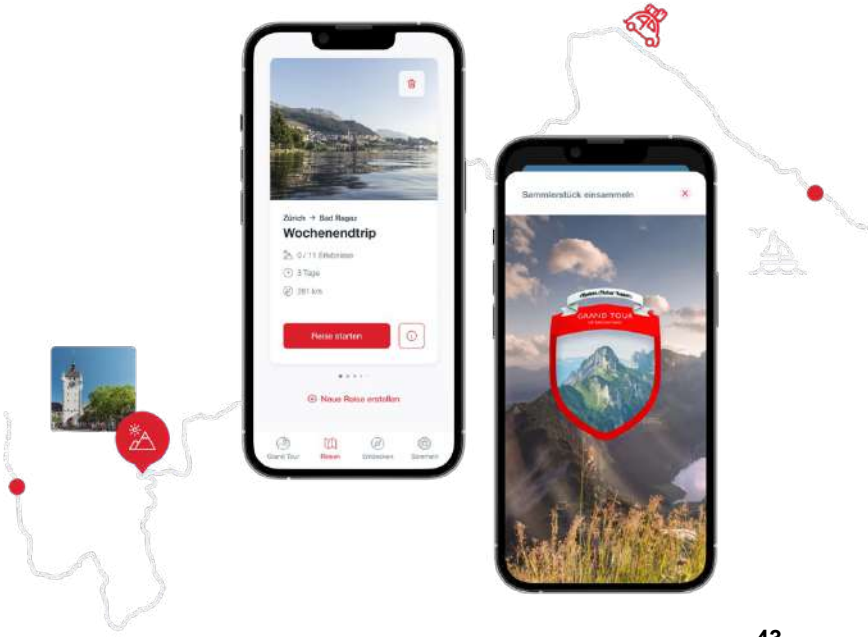
Web3 and AI as ST’s experimental areas.

Switzerland.

VR as an opportunity to discover Switzerland through mixed reality glasses.

AI as an opportunity to delight more guests with precision to discover the beauty of Switzerland.

NFT’s as a new approach for interactive tourism marketing.



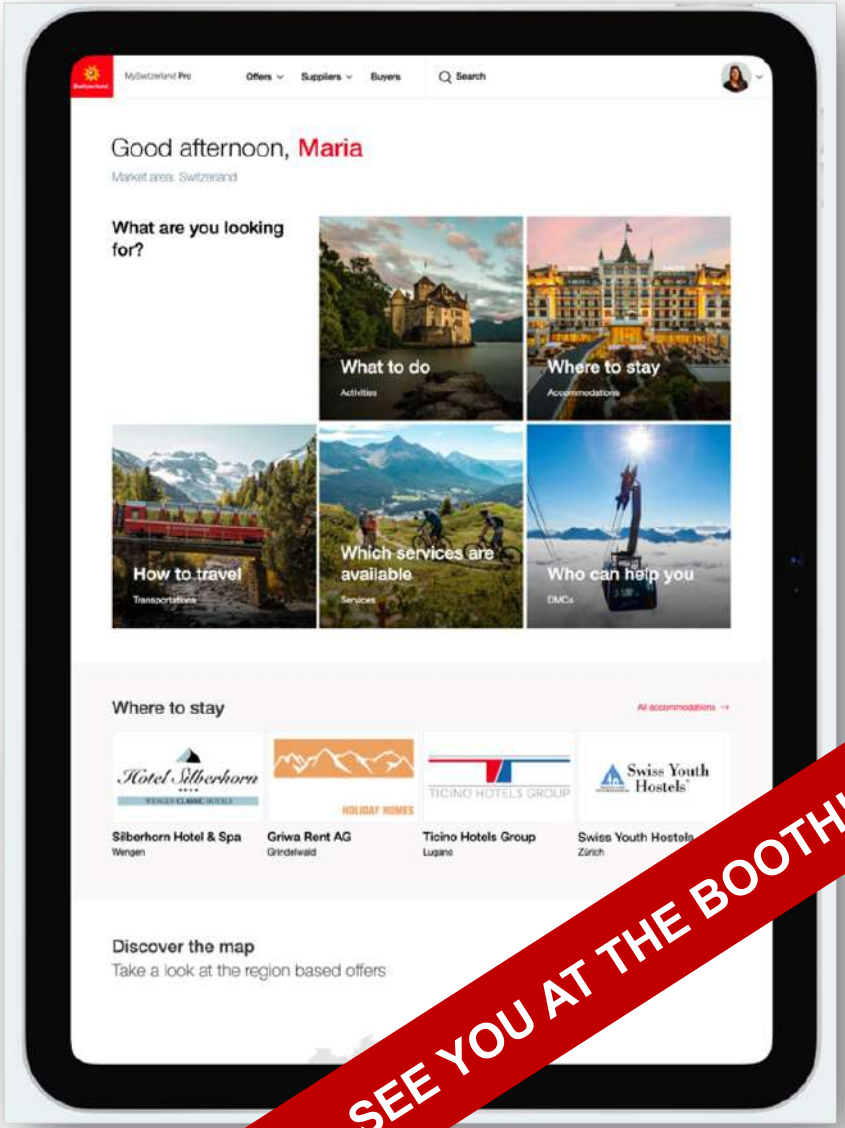
MySwitzerland Pro. B2B Digital.

Switzerland.

Webbased B2B-Platform to connect swiss touristic suppliers and destinations with global travel trade.

- ✓ > 1250 active users and growing.
- ✓ > 440 buyers from over 40 markets.
- ✓ Quality assurance by ST.
- ✓ Free of charge.

Register now for free:



NEW: Hotel Room Alert
A new feature that allows to inform buyers about short notice availabilities of hotel capacities.

Data for better decisions.

Switzerland.

Empirical market research

Tourismus Monitor Switzerland (TMS)
Brand Equity Monitor

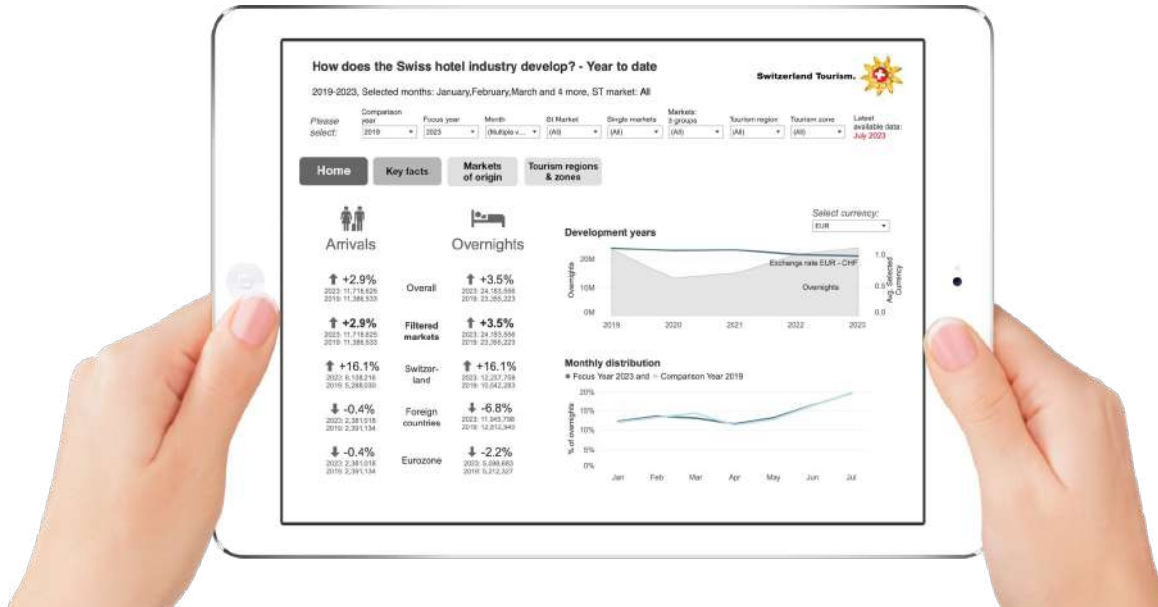
External data sources

HESTA
Economic figures
Flight data
Exchange rates
…

Special projects

e.g. Personas

Management Information System



Housekeeping

KPM Extended: Day 1 – Focus Marketing

Switzerland.

Time	Topic	Speaker	Location	Group
09:45 – 10:45	Opening	Martin Nydegger and other members of the Executive Board	Kleiner Saal	everyone
11:15 – 12:15	All-year tourism Artificial Intelligence Partner Campaign	M. Pally, D. Chiani, R. Ammon D. Stöcklin, A. Freimann J. Lacourrège, S. Vonesch, A. Chessex	Kleiner Saal Bodensee Foyer	Blue White Green
12:15 – 13:30	*Lunch*		*Caféteria*	everyone
13:30 – 14:30	All-year tourism Artificial Intelligence Partner Campaign	M. Pally, D. Chiani, R. Ammon D. Stöcklin, A. Freimann J. Lacourrège, S. Vonesch, A. Chessex	Kleiner Saal Bodensee Foyer	Green Blue White
14:45 – 15:45	All-year tourism Artificial Intelligence Partner Campaign	M. Pally, D. Chiani, R. Ammon D. Stöcklin, A. Freimann J. Lacourrège, S. Vonesch, A. Chessex	Kleiner Saal Bodensee Foyer	White Green Blue
From 16:00	*Apéro*		*Caféteria*	everyone
16:00 – 17:00	*Workshop WEURO*	*M. Pally, V. Grobet*	*Kleiner Saal*	*by invitation*