



Switzerland.



All-Year-Tourism Workshop. Key Partner Days 2023.

Rahel Ammon, Daniela Chiani, Martin Pally.
6th November 2023.

Grüezi mitenand!

Martin Pally
Head of Campaigns



Daniela Chiani
Director Greater China



Rahel Ammon
Head Product Development



Agenda.



Switzerland.

1. Intro all-year tourism
2. ST Approach
3. Markets Deep Dive
4. New Autumn Study
5. Outlook Autumn 2024
6. Interactive Session





But it's no longer only about Summer or Winter.



It's also about the in-betweens.



Switzerland.



**All-year-tourism
should concern all of us.**

All our Hotels are half-empty.



Schweizer Hotellerie: Netto-Zimmerauslastung in % nach Tourismuszone

	2000	2005	2010	2015	2019	2022
Berg		45.3	50.0	47.3	52.0	51.1
Grossstadt		62.1	66.2	65.8	68.0	57.6
Kleine Stadt		48.4	53.2	53.3	56.2	52.4
Land		33.7	36.7	36.6	37.5	38.6
Schweiz Total		47.6	52.3	51.5	55.2	51.6

Quelle: BfS, Beherbergungsstatistik

Net room occupancy = number of room nights (number of occupied rooms)*100 divided by room capacity (available rooms * number of days open)

A woman with blonde hair in a braid, wearing a red and white plaid shirt, is seen from behind. She is making a heart shape with her hands. In the background, there is a Swiss flag (red with a white cross) and a mountainous landscape under a bright sky. The text "Let's fall in love with all-year-tourism." is overlaid on the image.

Let's fall in love with all-year-tourism.



It's sustainable in all three dimensions.

Economic

- Enables the diversification of revenue streams
- Reduces the reliance on seasonal peaks
- Encourages investments in tourism services and infrastructure, benefitting the visitor experience

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Environmental

- Alleviates negative effects of overcrowding during peak seasons
- Evenly distributed tourism flows throughout the year can help preserve nature and cultural attractions

Our Approach.



Switzerland.

**Diverse market portfolio, 36
offices in 23 markets**



Promoting shoulder seasons, especially Autumn



Business Tourism



Our Approach.



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**Diverse market
portfolio.**

Different markets. Different peaks.



A closer look.
Greater China.

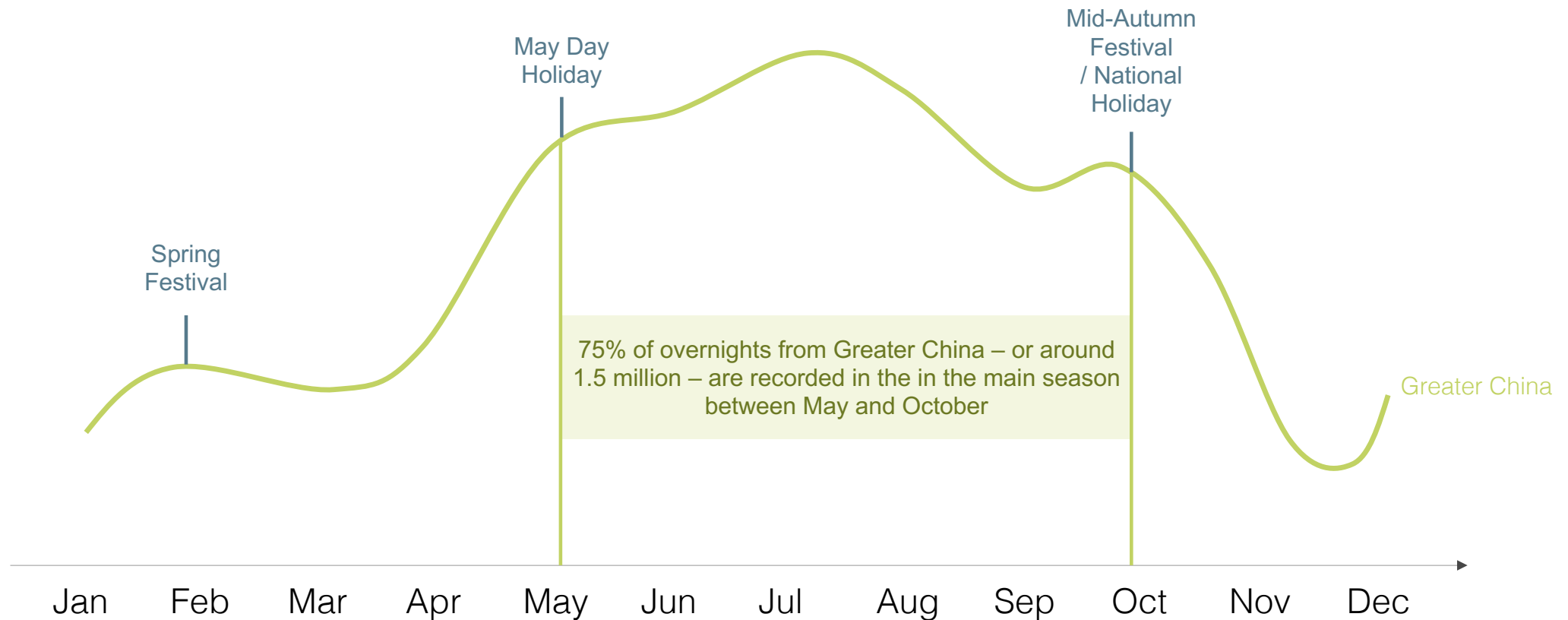


Switzerland.



Temple of Heaven, Beijing

Case Study. Greater China.





Switzerland.

Potential within the extended high seasons.

- APAC is the **driver of growth** during the winter season
- In the last 10 years, Greater China saw an **increase of over 400%** of overnights during the winter months
- Different seasonality and festivities lead to different travel patterns: snow sport fans **travel to Europe off-peak**, after the Chinese spring festival (late January – March)



Golden Week Travel.



- 1.4 million border crossings (85% of 2019) during the 8 day Golden Week holiday in 2023
- Affluent travellers will choose further and more exclusive destinations to escape the masses
- An increasing number of affluent travellers with more flexibility are choosing off-Golden week periods to travel

Seeking work-life balance.

- Younger generations are tired of the '996' culture and increasingly **seek more balance in their lives**
- 'Lying flat' or 躺平 (tǎng píng) has turned into a national phenomenon **celebrating idleness**
- After the pandemic, an increasing number of Chinese are looking for **more mindful, experience-driven and tailor-made travel**



A culture of admiring nature.



踏青賞花
tà qīng shǎng huā
to enjoy flowers on a spring outing



秋色宜人
qiū sè yí rén
a bright and beautiful autumn scene

Our Approach.



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Business Tourism



Our Approach.



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A scenic autumn landscape featuring a calm lake that perfectly reflects the surrounding environment. The lake is bordered by a dense forest of trees with vibrant orange, yellow, and brown foliage. In the background, sharp, snow-capped mountain peaks rise against a clear blue sky. The overall atmosphere is peaceful and picturesque, capturing the beauty of the fall season.

**For a better understanding of the autumn
season:**

**New Autumn Study,
conducted by EBP Schweiz AG.**

Result.



Switzerland.



Demand is lower than supply.



The Potentials.

Economic potentials for the destinations.

- Autumn offers the opportunity to provide a profitable offer for destinations and individual businesses until **well into November**
- It already works well where the three factors of **offer development**, **destination strategy** and **entrepreneurial innovation** work together
- A **reduced but flexibly managed** offer geared towards demand enables a positive experience for guests and an economically viable offer for providers
- In addition to individual business benefits, the **extended value chains** in the entire region benefit in autumn

Social potentials for the destinations.

- A lively autumn season strengthens the destinations' **profile as an attractive place to live and work**
- Opportunity to offer **year-round working contracts** (instead of season-based) results in more flexible capacity planning, higher employee satisfaction and lower staff turnover
- Year-round contracts are also a significant competitive advantage for certain jobs

How to be successful?

A specific autumn strategy is the first step.

1. Elaborate a holistic autumn strategy on regional level or as destination
2. Foster a common understanding of the "autumn season" among all local players and providers
3. Be aware that interdependence between the individual providers is even more pronounced
4. Focus on specific topics such as autumn nature (colours), tranquillity, culinary delights, attractive prices, wellness. Travel reasons for guests are according to the study clearly autumn-specific and should be addressed accordingly in marketing.

Create a viable and flexible offer.

1. Create and/or maintain an attractive outdoor and indoor tourist offer that can be used both in summer and autumn
2. Consider that bad weather offers (e.g. wellness) often are not a reason to travel, but an (expected) additional offer, which has a higher priority in autumn
3. Try to make your offer as flexible as possible
4. Avoid closings, if you are not profitable, check cross-financing options with summer or winter



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Good news!

- What has become clear in the case studies is that as soon as this "critical threshold" is crossed, a **positive feedback loop** can set in, with more and more providers gradually establishing an autumn offer.
- This in turn further improves the offer and the attractiveness of the destination in late autumn from year to year and creates a lasting impression among guests.





Autumn pays off.

Positioning

Good Accessibility

Critical Mass

Altitude

In- & Outdoor offers

Communication



Autumn Campaigns & Products. What makes Swiss autumn unique?

Autumn positioning 2018-2026.



The season of intense experiences for all senses.



SEE

SMELL

TASTE

FEEL

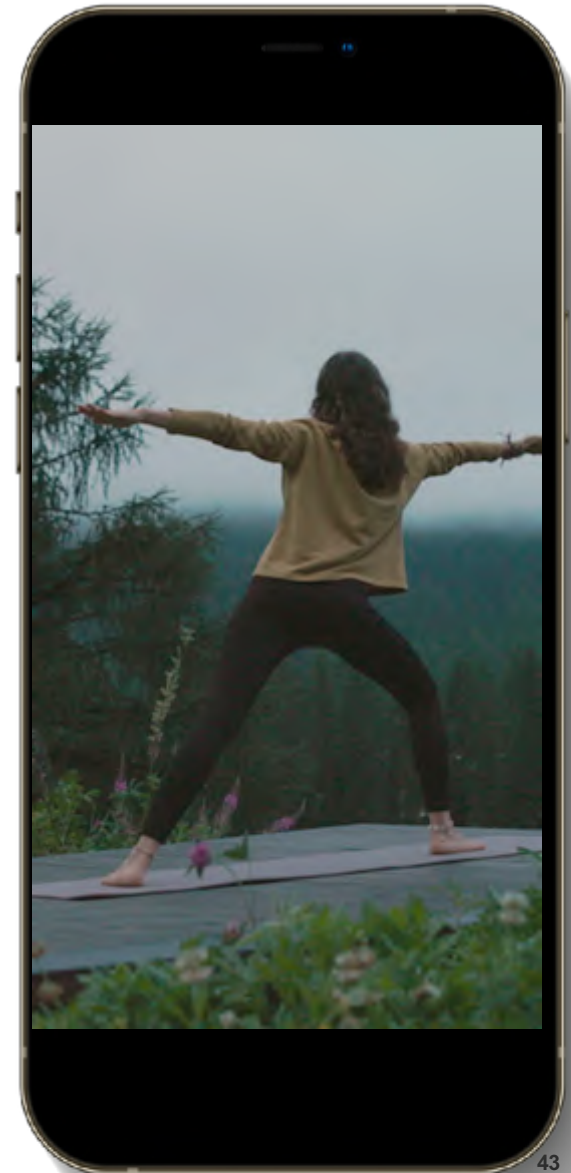
HEAR

And – of course – Swisstainable.



Nature Spa.

The most unique natural wellness experiences in Switzerland.

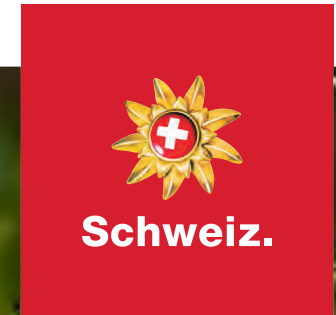




Schweiz.

Grape Escapes.

Conthey, Autumn Panorama



**Switzerland Tourism and Swiss Wine Promotion
present authentic accommodations in the
middle of Swiss vineyards.**

Why.



#WineTourism is in vogue and an ideal autumn connection.



A guest need: 35.9%** of those guests interested in wine experiences are interested in staying overnight at a winery.

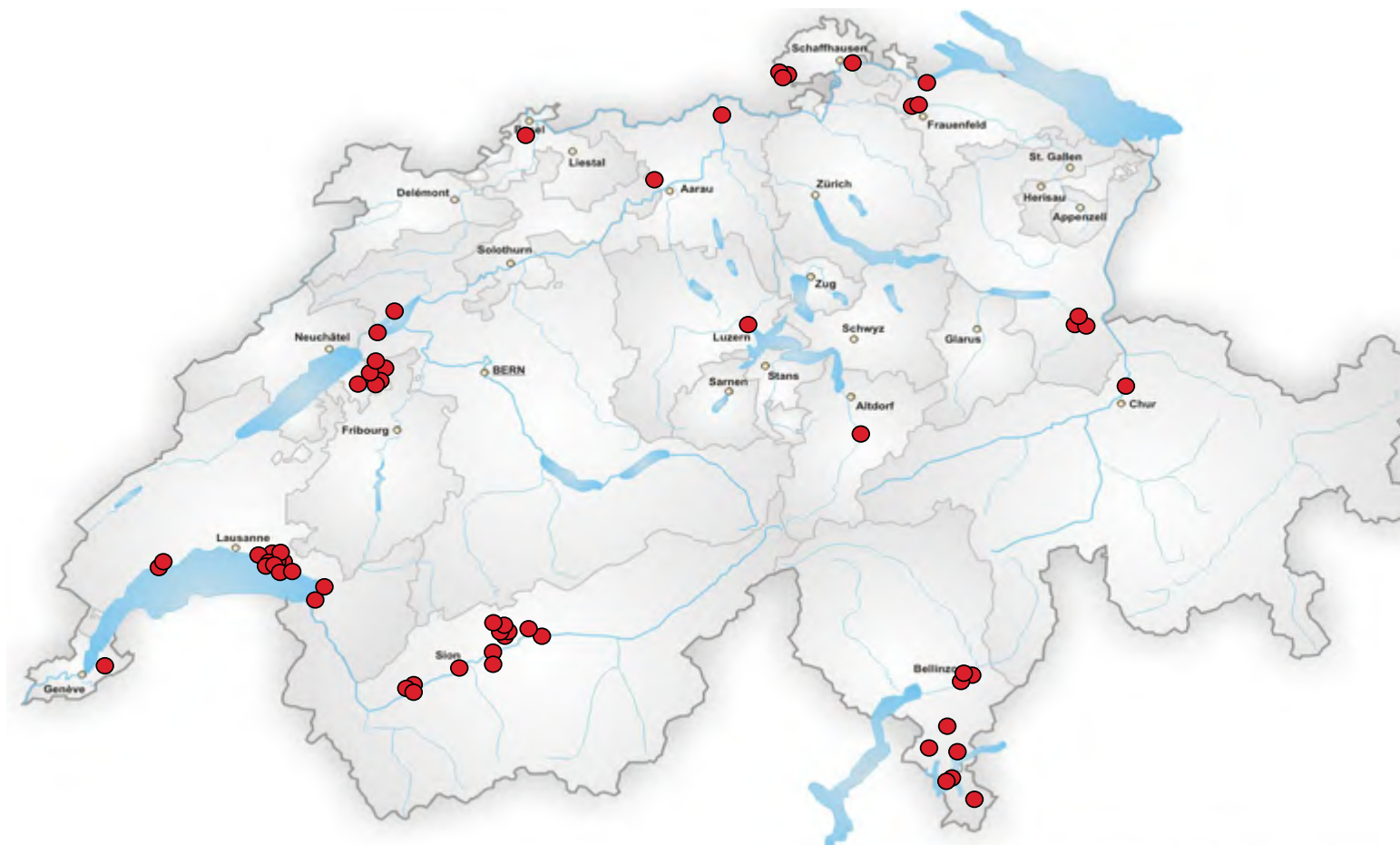
** Önologie-Produktanalyse (TMS 2017 – Nachbefragung.pdf)



A well-kept secret. Less than 2%* of Swiss wines are exported.

* <https://www.forbes.com/sites/tmullen/2017/09/07/this-is-the-secret-attraction-of-swiss-wine/?sh=68bc3b42532d>

Distribution of the Grape Escapes accommodation across Switzerland.





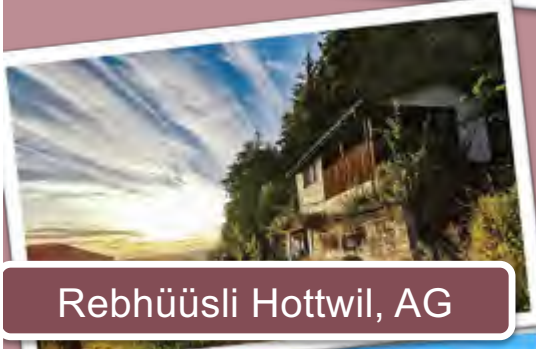
Birdbox Curzutt, TI



Boatel NE, FR, BE



Rebarbeiterhaus Twann, BE



Rebhüüsli Hottwil, AG



Strandkorb in den Reben, TG

Tiny home Maifenfeld, GR



Relais Castello di Morcote, TI



La Capite Le Vigny Cully, VD



Castel de Daval, Sierre, VS



Weinfasshotel Trasadingen, SH



Launch in May 2024.

Interested? You can still apply!
grapeescapes@switzerland.com

Autumn has become the most
important campaign for ST.

We need autumn for all our senses.

We need Switzerland.




Switzerland.

3-Year Plan.



Switzerland.

Touring	Autumn	Summer	Winter	SCIB	
	2024		2025		2026
Roger Federer	RF Autumn (+ Grape Escape) <ul style="list-style-type: none">Kris, LouEurope		RF Autumn 2.0 <ul style="list-style-type: none">Lou, PatEurope		RF tbd
Swisstainable 	Swisstainable Schweiz+ <ul style="list-style-type: none">Lou, PatCH		Swisstainable <ul style="list-style-type: none">Kris, MaxEurope		Swisstainable tbd
SCIB Bleisure	SCIB Bleisure <ul style="list-style-type: none">Persona tbd + Long Haul Markets		SCIB tbd		tbd
Paid-Media Always-on Campaign	Always-ontb <ul style="list-style-type: none">Continuous brand presenceMarkets tbd				
Accom. Campaign	Umbrella Hotel Cooperation Campaign <ul style="list-style-type: none">Personas tbdMarkets 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



Questions?

WE WANT TO HEAR YOUR
THOUGHTS.

Small Groups. 3 Topics.

1. How do you deal with the topic of all-year-tourism in your region? What measures are already in place or planned?
2. What are your biggest challenges?
3. What wishes or ideas do you have for ST regarding all-year-tourism?

Summary.

Thank you.



Switzerland.