



**Switzerland.**



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.



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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.



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

# All our Hotels are half-empty.

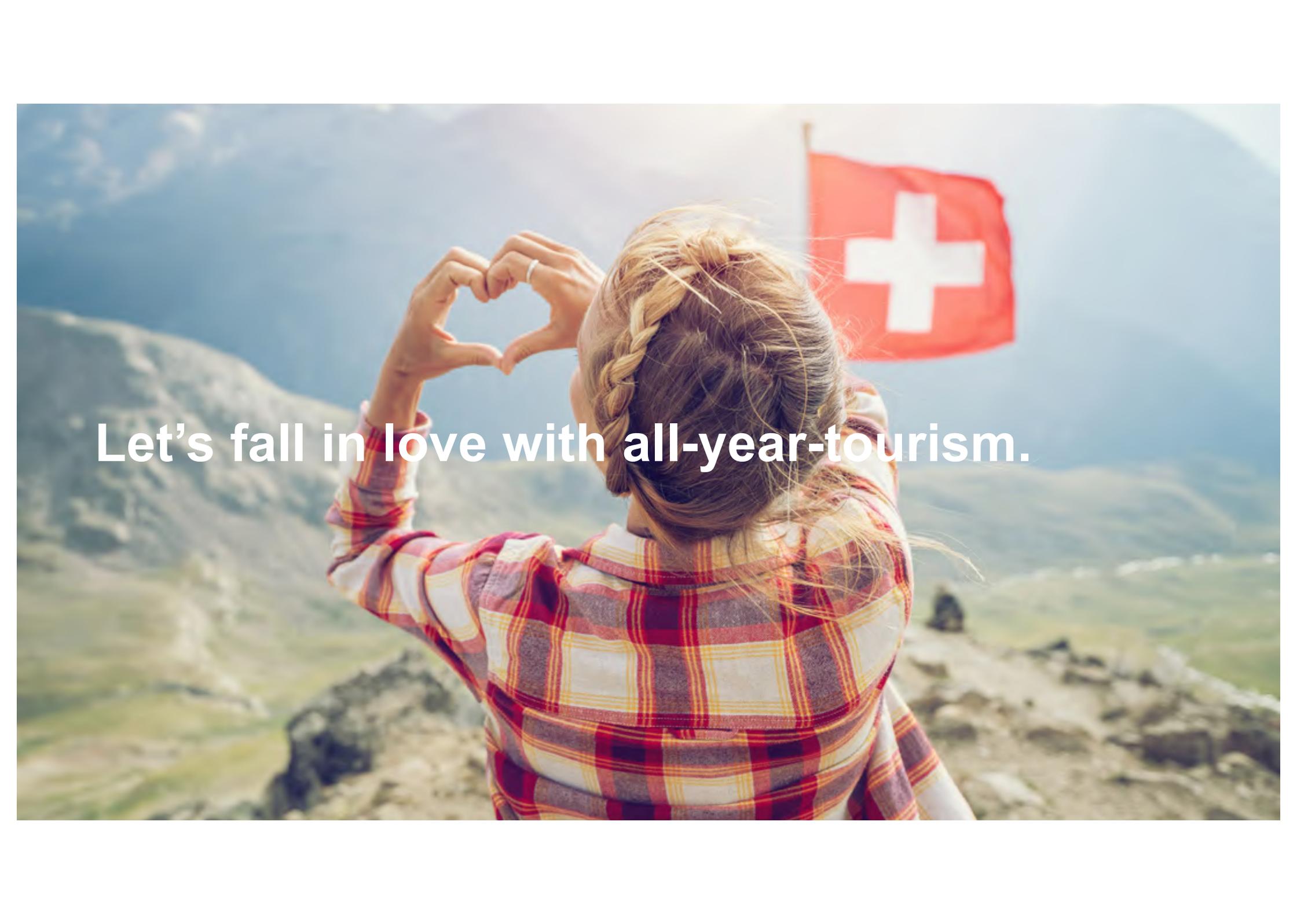


## Schweizer Hotellerie: Netto-Zimmerauslastung in % nach Tourismuszone

	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
<b>Schweiz Total</b>		<b>47.6</b>	<b>52.3</b>	<b>51.5</b>	<b>55.2</b>	<b>51.6</b>

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
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## Environmental

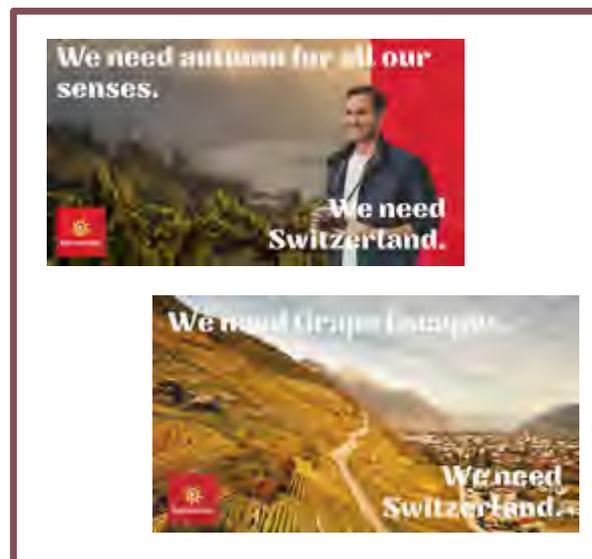
- Alleviates negative effects of overcrowding during peak seasons
- Evenly distributed tourism flows throughout the year can help preserve nature and cultural attractions

# Our Approach.

Diverse market portfolio, 36  
offices in 23 markets



Promoting shoulder seasons,  
especially Autumn



Business Tourism



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**Diverse market  
portfolio.**



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# Different markets. Different peaks.



A closer look.  
Greater China.

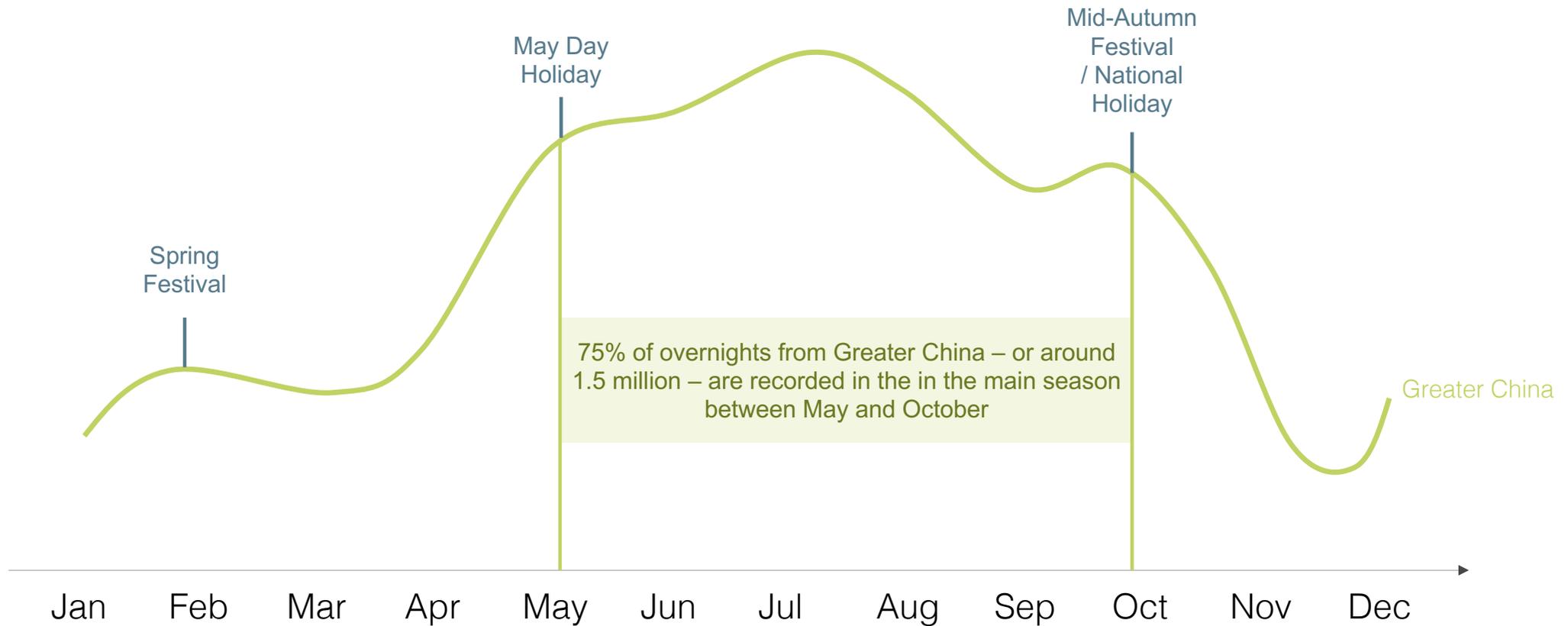


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Temple of Heaven, Beijing

# Case Study. Greater China.

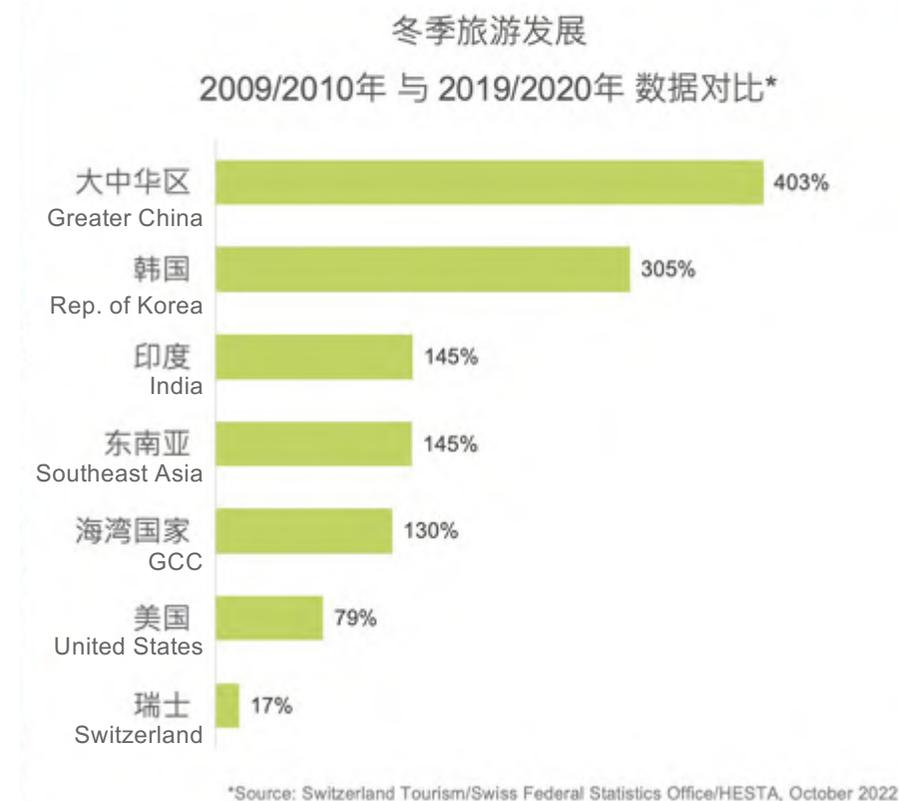




Switzerland.

## 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.



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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

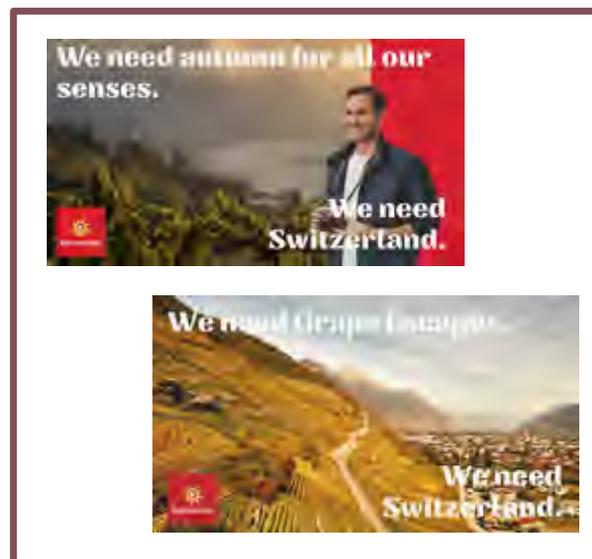
# Our Approach.



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Business Tourism



# Our Approach.



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

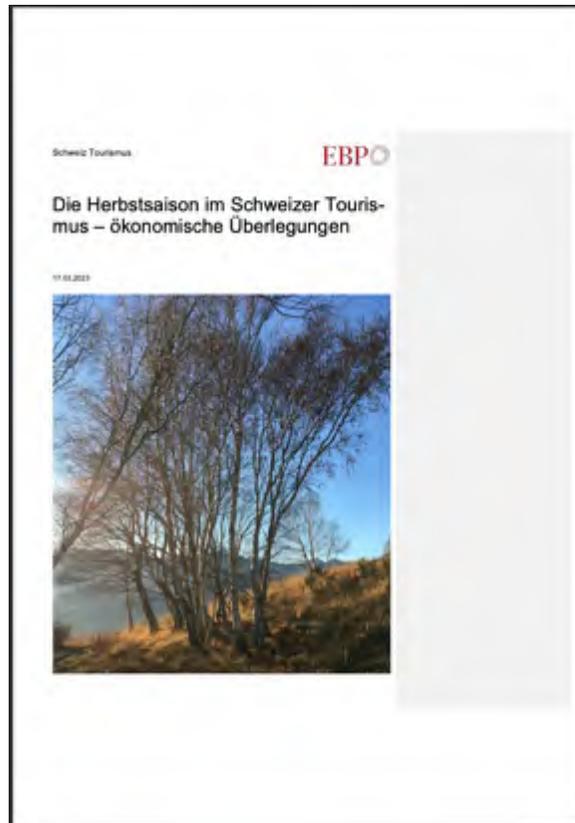
**For a better understanding of the autumn  
season:**

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

# Result.



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Demand is lower than supply.



A scenic landscape photograph featuring a mountain range in the background with a prominent, snow-capped peak. In the foreground, a calm lake reflects the surrounding forest of tall, thin trees. The sky is clear and blue. The text "The Potentials." is overlaid in the center in a large, white, sans-serif font.

# 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

A photograph of a misty forest. In the foreground, a large tree trunk is covered in vibrant green moss and surrounded by a thick layer of fallen brown leaves. The background is filled with tall, slender trees, their trunks and branches partially obscured by a soft, white mist. The overall atmosphere is serene and quiet.

# 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

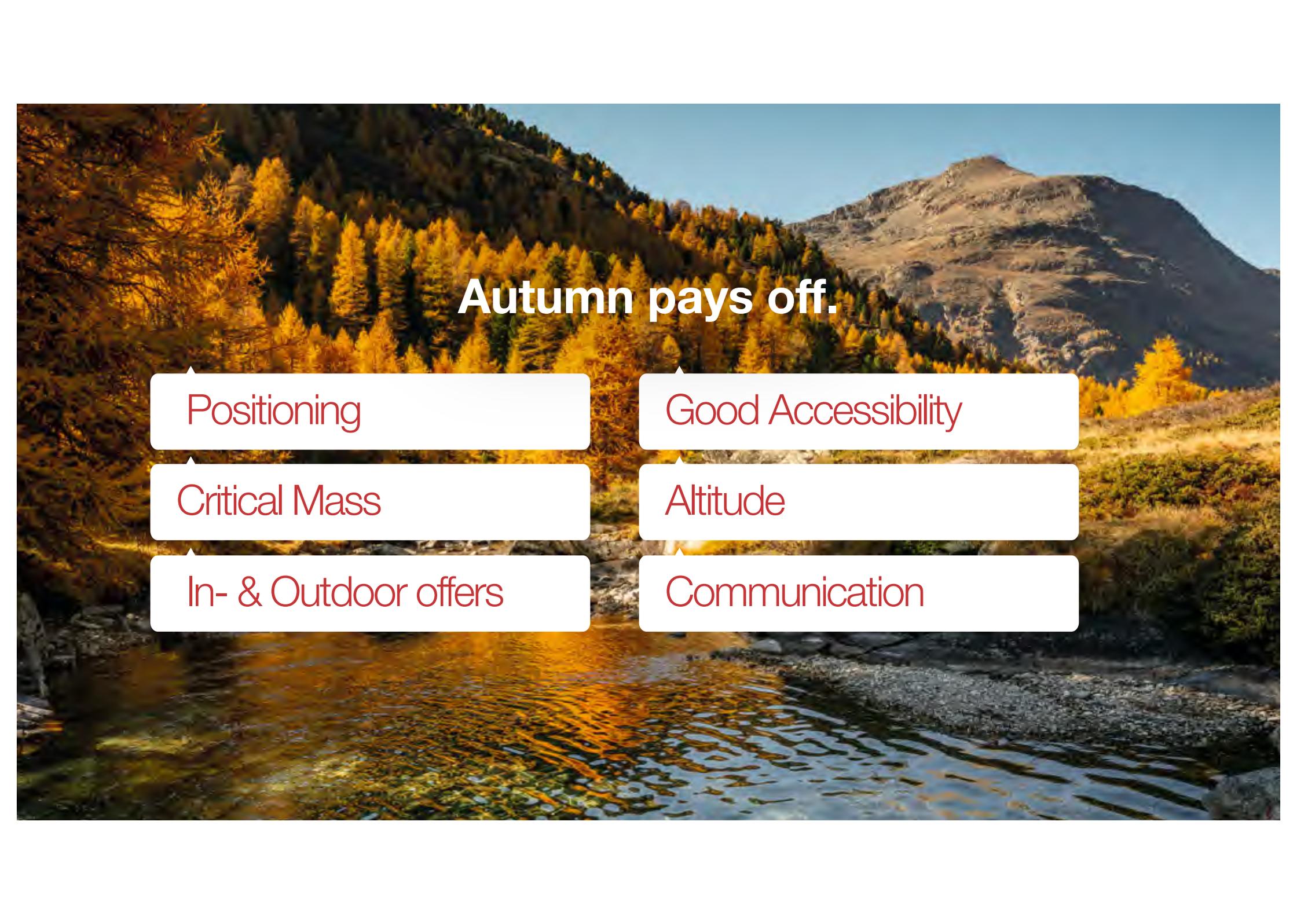
## Good news!

- 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.



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## 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

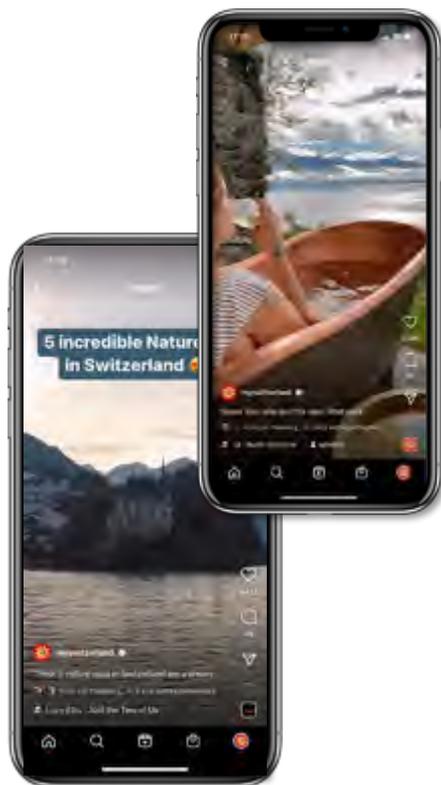
HEAR

And – of course – Swisstainable.



# Nature Spa.

The most unique natural wellness experiences in Switzerland.





Schweiz.

# Grape Escapes.



**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.

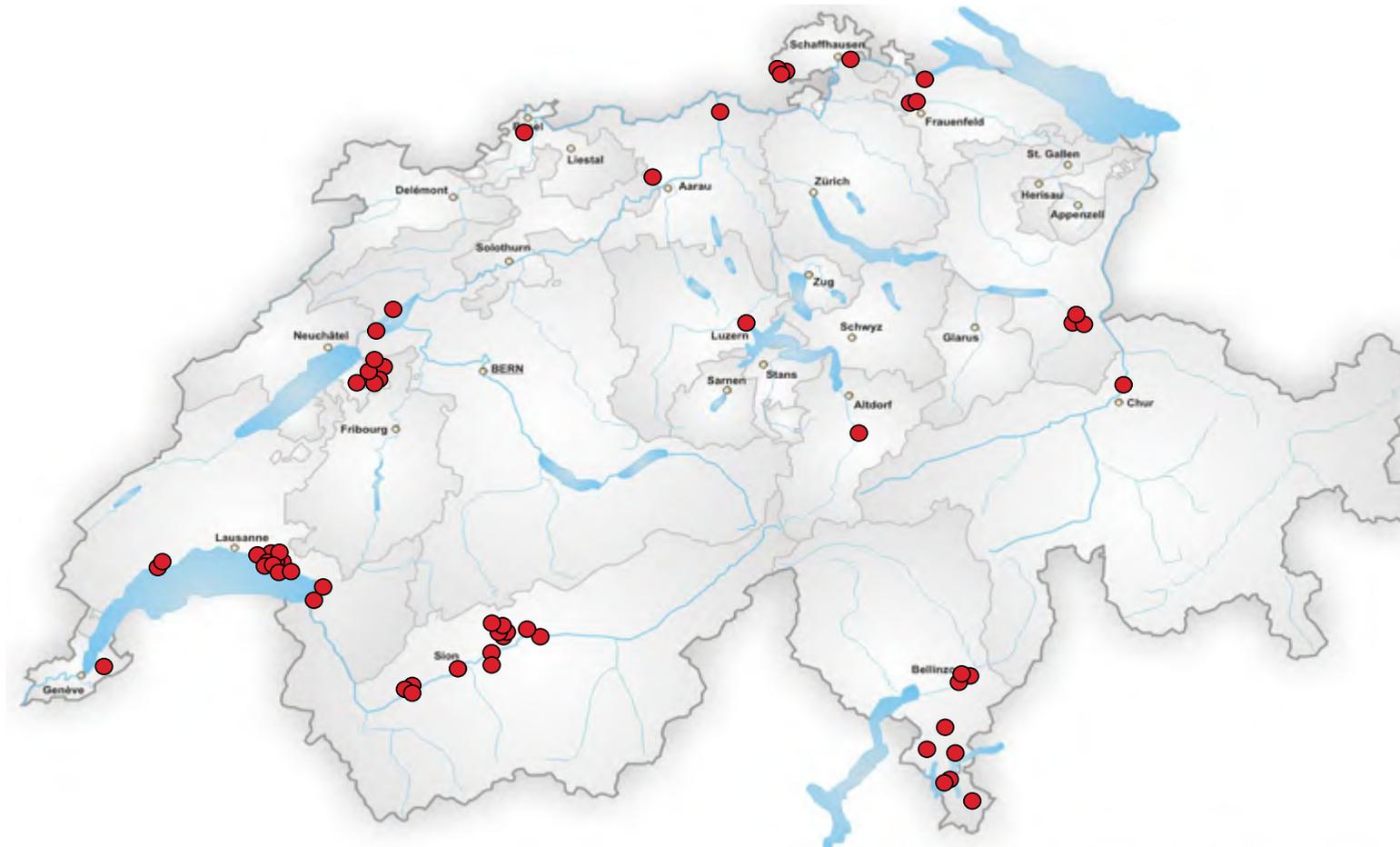
\*\* Önologie-Produktanalyse (TMS 2017 – Nachbefragung.pdf)



**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.





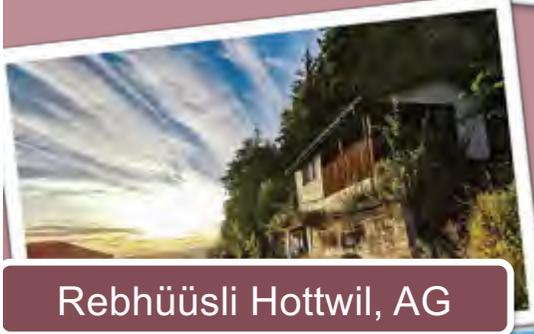
Birdbox Curzutt, TI



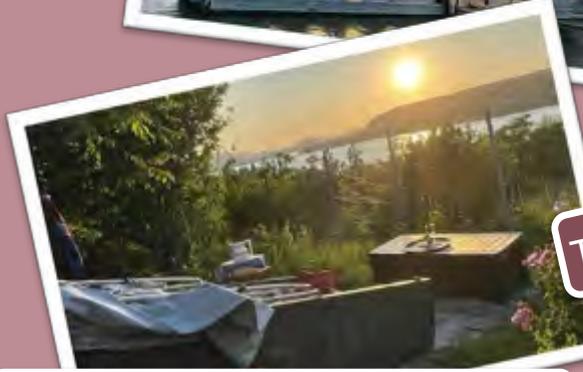
Boatel NE, FR, BE



Rebarbeiterhaus Twann, BE



Rebhüüsli Hottwil, AG



Strandkorb in den Reben, TG

Tiny home Maifenfeld, GR



Relais Castello di Morcote, TI



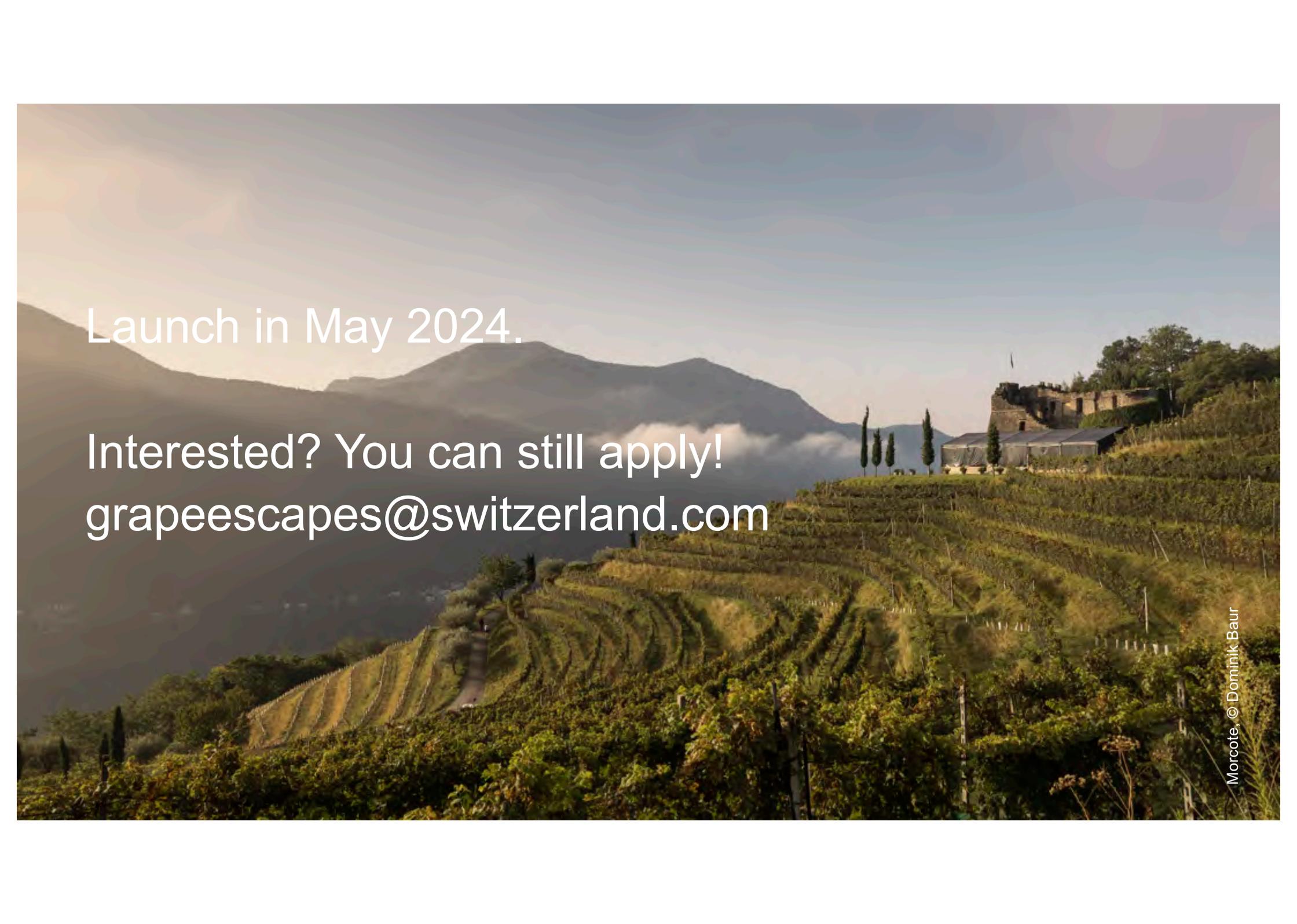
La Capite Le Vigny Cully, VD



Castel de Daval, Sierre, VS



Weinfasshotel Trasadingen, SH

A scenic view of a vineyard on a hillside in Morcote, Switzerland. The foreground shows rows of grapevines on a steep slope. In the middle ground, there is a stone building with a flag on top, surrounded by trees. The background features rolling mountains under a clear sky.

Launch in May 2024.

Interested? You can still apply!  
[grapeescapes@switzerland.com](mailto: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.



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Touring	Autumn	Summer	Winter	SCIB	
	2024		2025		2026
Roger Federer	RF Autumn (+ Grape Escape) <ul style="list-style-type: none"> <li>• Kris, Lou</li> <li>• Europe</li> </ul>		RF Autumn 2.0 <ul style="list-style-type: none"> <li>• Lou, Pat</li> <li>• Europe</li> </ul>		RF tbd
Swisstainable 	Swisstainable Schweiz+ <ul style="list-style-type: none"> <li>• Lou, Pat</li> <li>• CH</li> </ul>		Swisstainable <ul style="list-style-type: none"> <li>• Kris, Max</li> <li>• Europe</li> </ul>		Swisstainable tbd
SCIB Bleisure	SCIB Bleisure <ul style="list-style-type: none"> <li>• Persona tbd + Long Haul Markets</li> </ul>		SCIB tbd		tbd
Paid-Media Always-on Campaign	Always-ontb <ul style="list-style-type: none"> <li>• Continuous brand presence</li> <li>• Markets tbd</li> </ul>				
Accom. Campaign	Umbrella Hotel Cooperation Campaign <ul style="list-style-type: none"> <li>• Personas tbd</li> <li>• Markets tbd</li> </ul>		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.



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