



Market Updates

September/October 2023

Editorial

Dear readers,

Throughout the world, our teams successfully positioned the autumn as the travel season for all senses - be it through campaigns, media, events or fam trips. A seasonal shift is already visible in some of our Asian markets and support our quest for a sensible steering of tourism flows.

Meanwhile in Europe, consumer sentiment has stabilised and inflation outlook improved. Our currently best performing market US is set on record course with more direct flights to Switzerland added for the 2024 summer schedule.

We wish you much reading pleasure.

Yours truly,

Corinne Genoud
Head of Markets West



1. Priority Markets

BENELUX

Market Situation

Inflation in the Netherlands fell to below 1% in September and October. Energy prices in particular have fallen sharply. If energy prices are excluded, inflation remains a good 6% in these months. The same picture emerges in Belgium. These are good prospects for the upcoming winter tourist season. Recent studies in the Netherlands predict strong demand for winter holidays.

Campaigning & Activation

Meetings:

Belgium

- Boardroom Magazine: 2 pages about Interlaken and Swiss Ecomic Forum : *The Secrets of Interlaken's Success as the SEF's Host Destination*: 7'500 ex
- eNews sent to SCIB Database to 1450 contacts: Where winter wonders await.
- eNews (September) sent by Associationplanner.eu to 1'900 contacts. Small introduction and link to online article about Basel: Basel: a true welcoming culture for associations.
- eNews (October) sent by Corporateplanner.be to 4'000 contacts. Small introduction and link to online article about Basel: Bazel: kennishub op het vlak van farmacie, biotechnologie, biowetenschap en technologie. Bâle : pôle de connaissances dans les domaines pharmaceutique, biotechnologique, des sciences de la vie et de la technologie.

Summer Marketing

Netherlands & Belgium:

- Roularta article with Evi Hanssen content (print & online)
- Online push cycling campaign with wielerflits.nl/be
- Ongoing cycling and Evi Hanssen campaign on ST Meta channels
- YouTube & Google Ads campaign

Autumn Marketing

Netherlands & Belgium:

- Recovery: Collaboration with Rainkiss, social media campaign
- Recovery: Autumn content and video from HQ in Dutch and Belgian magazines *indebergen* & *Pasar*, collaboration with Belgian automobile club
- Evi Hanssen trip to Zürich & Luzern



KAM

Meetings:

Belgium

- SCIB annual networking evenings in Brussels:

17/10: for corporate and association planners at Plein Publiek: 40 guests; 11 Swiss partners. Total 60 participants. Key-note speaker: Siviglia Berto: People sustainability: the cornerstone of a thriving future.

18/10 for PCO's and incentive agencies at The Mix: 35 guests, 11 Swiss partners. Total 50 participants: Thème: All your senses in action in Switzerland: 5 senses activity

KMM

Meetings:

Belgium

- MIM/Headquarters Magazine: 2 pages article about Switzerland Meeting Trophy: Meeting Trophy 2023: Showcase of Swiss Quality. 8'500 ex.

-MIM Headquarters Magazine: 2 pages article about Kursaal Interlaken

Meetings Between Lakes and on Mountain Slopes! 8'500 ex.

Future Activities

Winter/cities Marketing

Netherlands & Belgium:

- Influencer trip in November/December to different Christmas markets in Switzerland
- Affordable Art Fair Amsterdam with exclusive project with Basel Tourism in November.
- ACSI Winter Camping activation with Bern (print + online).

Meetings

Belgium:

- BCD Event in Zurich
- IBTM
- BBT speed date workshop



1. Priority Markets

FRANCE

Market Situation

The inflation in France is still present with a 5.7% increase in September. It can be felt in commodity prices such as food, housing and especially transportation.

The economy slowed down a bit more than predicted in Q3 due to tight financing conditions & fall in industrial activity.

The societal situation remains quite tense regarding the position of France in the Israeli Palestinian conflict.

Tourism to Switzerland from France is doing really well, with a plus of over 8% in terms of overnights comparing with the record year 2022.

Campaigning & Activation

SCIB:

- 13 articles publiés sur le blog. 26'720 visites sur le blog au total.

- Webinaire "Crans-Montana pour vos séminaires CoDir ou incentives à la montagne." 17 personnes ont participé en direct, 18 no show et 61 autres personnes pas dispo, mais intéressées par la thématique.

- Diffusion de l'e-news 04 "Votre événement au sommet : découvrez Davos, la plus haute ville d'Europe" à 2212 contacts. Ouverture unique : 653 / taux d'ouverture : 29.91%

- Diffusion de l'e-news 05 "Lausanne : la capitale olympique pour vos événements 2024." à 2 221 contacts. Ouverture unique : 629

/ Taux d'ouverture : 28,7 %

- Campagne Outbrain file rouge avec diffusion différents contenus (destinations, témoignages, thématiques ...) de MyS Meetings. 40'769 clics et un CTR moyen de 0,64.

- Campagne Meet-In.fr : dossier thématique "Séminaire au vert" avec

2 articles intégrés au site web. Dispositif newsletter, e-news et post sur LinkedIn pour mener sur la page. 2050 vues sur les deux articles.

- Campagne sur decision-achat.fr : dossier thématique "Mice durable" avec brandvoice (publireportage). Dispositif newsletters, 25000 impressions LinkedIn, Habillage exclusif de la rubrique Focus pendant 1 semaine, 15000 impressions habillage en rotation générale sur le site. Résultats pas encore communiqués

AUTOMNE :

- Milk / Milk Deco : Création de 2 tirés à part 16 pages dédiés à l'automne en Suisse. Un tiré à part encarté dans le magazine parental lifestyle Milk avec un contenu orienté famille; un tiré à part encarté dans le magazine lifestyle Milk déco orienté tout public. Relai du contenu sur le digital avec une



visibilité sur les réseaux sociaux. 130'000 contacts print - 800'000 reach sur le digital (site et social)

- Découverte de l'automne en Suisse par le couple d'influenceur les @bestjobers. Relai de leur voyage sur leur réseaux sociaux (156K sur IG) en live story - post et reel. Rédaction d'un article sur leur blog.

- Display : campagne display sur le fooding et sur easyvoyage. 2.3M d'impressions. octobre.

VILLES :

- BERNE : Publiportage dans le magazine Beaux Arts sur l'automne culturel à Bern. Mise en ligne de l'article sur le site de beaux arts et push sur leurs réseaux sociaux. 400'000 contact print - 257'000 visiteurs uniques par mois pour le site.

- PopIn Nendaz : édition du raid urbain à Nendaz le 09/09. 1ère édition montagne en été en Suisse. 560 participantes dont 55% sont restées 2 jours. relai de la course sur les réseaux sociaux.

- Lausanne : campagne display en inread et en social display sur le monde. 2.3M d'impression garanties. octobre

- Zurich : activation d'une campagne en partenariat avec la sncfconnect, STS ainsi qu'un volet influence. 3 temps de communication : dans un 1er temps mise en place d'une campagne de branding sur sncfconnect avec du display complété par un voyage influence (@hellotravelers), dans un 2ème temps présence sur sncfconnect en renfort d'une promotion TGV Lyria pour mettre en avant la destination Zurich et dans un 3ème temps reprise d'une communication branding sur sncfconnect.

CAMPAGNE AMBASSADEURS

Mise en place d'une campagne autour des bienfaits d'un séjour en Suisse à travers 3 personnalités : un chef franco-suisse pour la gastronomie, une aventurière suisse pour la durabilité et la nature et un sportif pour le sport. Production de 3 interviews hébergée sur notre chaîne youtube et sur une landing page dédiée sur MyS.com. Mise en place d'une campagne de communication digitale pour générer du trafic sur cette page dédiée : meta et native standard. démarrage de la campagne en septembre - en cours jusqu'à fin décembre.

KAM

SCIB:

- Pure Workshop sept 2023 : beaucoup de personnes sont venues sur notre stand. Reporting de quelques événements suisses en direct. Beaucoup de questions sur l'organisation de séjours au ski. 8 nouveaux contacts.

KAM:

- Salon ELUCEO des Comités d'Entreprise. Stand ST avec STC et Swiss Travel System pour proposer des offres de voyage aux employés des entreprises représentés par leur CSE. Nombreux contacts qualitatifs. Suivi des offres et demandes par STC

STM Genève:

- 8 Buyers, records de participations pour la France, premières nouvelles offres déjà mises en place par les participants français au STM.



KMM

Media event avec Bern Welcome and Made In Berne:

- le 7 septembre dans les Jardins de l'Ambassade de Suisse à Paris
- Mis en avant de la Capitale fédérale et son attractivité touristique et clin d'oeil à l'anniversaire de la Consitution fédéral via l'Ambassade
- Dégustation de bière par un sommelier Bernois
- 13 key media

Media Event avec Valais Wallis Promotion

- le 12 octobre
- Lancement de l'hiver dans un restaurant Suisse à Paris
- Workshop Raclage de raclette avec les journalistes
- 12 key médias

Suivi d'un Roadshow toujours avec Valais Wallis Promotion du 16 au 18 octobre pour aller à la rencontre de key media régionaux (Lyon, Grenoble, Dijon, Nancy, Lille)

Nombreuses retombées presse TV et Radio telle que des émission à grande audience telles que le JT de TF1, Echappées Belles sur France 5, Français du Monde sur France Info et une sérrier de 5 reportages au JT de France 3.

Future Activities

SCIB :

- Webinaire 04 Genève
- E-news 06 clôture année
- Soirée afterwork de Noël

KAM:

- Soutien de promotion de la Suisse au Salon SiTV à Colmar avec l'agence Formitour
- Evenement de Networking KAM à Paris en collaboration avec Österreich Werbung

Campaign & activation :

- Lancement de la campagne hiver
- voyages influence



1. Priority Markets

GCC

Market Situation

Impact of Gaza conflict:

- Cancellations of festivals and events with a certain nature (e.g. Dubai Comedy Festival).
- However, large-scale business events still take place (GITTEC, sporting events in KSA) - business as usual.
- Minor impact on booking situation according to travel trade
- No influence on flight routes GCC-Switzerland
- ST: Consideration at events/presentations and mindfulness with brand message

Campaigning & Activation

Health advertorial in September issue of Sayidaty Magazine (topic Cardiology).

Health distribution via Issuu (partnership with 7awi to generate 100,000 Arabic speaking users for Swisstainable brochure).

Health Newsletter

Autumn SoMe newsletter

Autumn SoMe campaign

SITC end-consumer event in Jeddah

STS SoMe campaign

Weddings SoMe campaign

Digital:

Autumn Newsletter.

Health: medical facebook campaign

Family Hotel digital push (facebook)

STS newsletter

Health Bad Ragaz Clinic newsletter



KAM

9-14 September 2023: STM Geneva. 20 leisure and 3 MICE agents joined the event. Dedicated GCC pre-convention tours to Bern/Interlaken and Zurich.

12 Sept: 50 years dipl. relations UAE/CH luncheon at Jardin Anglais Pier, Geneva

Wedding: destination Wedding educational trip

Antenna launch at Embassy in Riyadh

Sales Calls in Saudi and GCC

KMM

Press conference in Jeddah



1. Priority Markets

GERMANY

Market Situation

Trade-Branche

Nach Zahlen der Marktforscher von Travel Data + Analytics (TDA) buchten viele Bundesbürger im September 2023 kurzfristig noch Herbsturlaube und fast jeder vierte Umsatzeuro sei bereits der Buchung von Sommerurlauben im kommenden Jahr geschuldet, so TDA. Die Umsätze für die anstehende Wintersaison klettern gegenüber dem Vormonat um zwei Prozentpunkte auf ein Plus von acht Prozent zum Vor-Corona-Niveau. Die noch laufende Sommersaison legt zum Vormonat um einen Prozentpunkt auf ein Umsatzplus von zwölf Prozent zu.

Die aktuellen Ergebnisse des Touristischen Vertriebsklima-Index für den Oktober 2023 von Dr. Fried & Partner zeichnen insgesamt ein positives Stimmungsbild ab. Die teilnehmenden Reisebüros schätzen ihre gegenwärtige und zukünftige Lage optimistisch ein und erwarten in den nächsten sechs Monaten keine starken Schwankungen. Die aktuelle Vertriebslage von Reiseleistungen hat sich im Oktober positiv entwickelt. Im Vergleich zu den Werten im September zeigt der Index einen Anstieg des Anteils der Befragten, die beim Vertrieb von Reiseleistungen die aktuelle Lage als „gut“ bewerten um 7,5 Prozentpunkte auf 58,6%. Gleichzeitig ging der Anteil der „befriedigenden“ Bewertungen auf 35,4% zurück (September: 41,5%). Die Zahl der Befragten, die in Bezug auf die aktuelle Vertriebslage mit „schlecht“ geantwortet haben, schrumpft weiter auf 6,1% (September: 7,4%). Die Nachfrage nach Reiseleistungen wird laut der Einschätzungen der teilnehmenden Reisebüros in den nächsten 6 Monaten voraussichtlich stabil bleiben. Ebenso erwarten 31,6% der Befragten eine Verbesserung der Ertragsituation in den nächsten 6 Monaten, während 54,7% davon ausgehen, dass sie unverändert bleiben wird (Vormonat: 52,1%). Nur noch 13,7% erwarten eine Verschlechterung (Vormonat: 17%).

Wirtschaft

Die Stimmung in der deutschen Wirtschaft hat sich verbessert. Der ifo Geschäftsklimaindex ist im Oktober auf 86,9 Punkte gestiegen, nach 85,8 Punkten (Saisonbereinigt korrigiert) im September. Die Unternehmen zeigten sich etwas zufriedener mit den laufenden Geschäften. Die Manager waren zudem weniger pessimistisch für die kommenden Monate. Die deutsche Wirtschaft sieht einen Silberstreif am Horizont. Allerdings haben die führenden Wirtschaftsforschungsinstitute ihre Konjunkturprognosen angesichts des schwierigen Umfelds gesenkt. Statt dem bislang erwarteten Wachstum des Bruttoinlandsprodukts von 0,3 Prozent wird nun für das laufende Jahr ein Rückgang von 0,6 Prozent vorhergesagt. Das geht aus der Gemeinschaftsdiagnose für die Bundesregierung hervor. Für 2024 wird wieder ein Wachstum erwartet, das mit 1,3 Prozent aber schwächer ausfallen soll als im Frühjahr mit 1,5 Prozent angenommen. 2025 soll es dann zu einem Plus von 1,5 Prozent reichen. Für die Verbraucher halten die Institute eine gute Nachricht parat. "An der Preisfront entspannt sich die Lage nach und nach", heißt es in der Gemeinschaftsdiagnose. Die Inflationsrate dürfte demnach im laufenden Jahr bei 6,1 Prozent liegen, 2024 aber deutlich auf 2,6 Prozent fallen und 2025 dann noch einmal auf 1,9 Prozent.

Verbraucher

Die Verbraucherstimmung in Deutschland zeigt im Oktober ein gemischtes Bild und damit keinen klaren Trend. Die Konjunkturerwartung legt leicht zu und die Einkommenserwartung muss Einbußen hinnehmen, während sich die Anschaffungsneigung nahezu unverändert zeigt. Der prognostizierte Wert des Konsumklimas im November sinkt somit auf -28,1 Punkte und beträgt 1,4 Punkte weniger als im Vormonat (revidiert -26,7 Punkte). Dies sind Ergebnisse der Konsumklimastudie der Gesellschaft für Konsumforschung (GfK) für Oktober 2023. Für eine Trendwende beim Konsum ist es unverzichtbar, dass sich der derzeit abzeichnende Rückgang des Preisauftriebs fortsetzt, so die GfK.



Best practice competitors

Kampagne von Visit Sweden: Grosses Medienecho in Deutschland zu der Kampagne von Schweden u.a. bei Werben & Verkauften (W&V), dpa, n-tv, T-Online und Touristik aktuell.

Campaigning & Activation

Imagekampagne mit der Deutschen Bahn: Vom 11.-24.09. fand die Imagekampagne zur Bewerbung des Schweizer Herbst in Kooperation mit der Deutschen Bahn und Swiss Travel System statt. Botschaft: „Weg vom Alltag. Hin zur Natur. - Mit der Bahn in die Schweiz“. Werbemittel waren City Light Poster an zentralen Plätzen, ein Youtube-Video und Bannerschaltungen auf diversen Onlineportalen.

Bahntastische Schweiz am 08.09. in Berlin: Abendevent im Technikmuseum, organisiert durch die Schweizerische Botschaft mit Schweiz Tourismus als einer von drei Hauptpartnern mit 600 Gästen aus Politik, Wirtschaft und Kultur und VR-Experience zur Grand Train Tour.

So klingt der Schweizer Herbst: Diese Digitalkampagne fokussiert auf Klänge aus dem Schweizer Herbst aus den Regionen Bern, Tessin und Wallis. Die Bewerbung erfolgte vom 6.-30.09. über Facebook, Instagram, YouTube und Spotify, wobei erstmals Podcast-Ads getestet wurden.

Influencerreise Swisstainable: Reise mit Nachhaltigkeitsbloggerin Louisa Dellert (@louisadellert) zum Thema Swisstainable und nachhaltiges Reisen. Mit dem Nachtzug aus Berlin ging es über Zürich mit dem Bernina Express ins Valsposchiavo, wo mehrere Wanderungen stattfanden. Die Reise fand vom 28.-31.08. statt und war ein Add-on zur Swisstainable Kampagne mit Die Zeit.

Influencer Reisen/ HQ Herbstkampagne: Für die Herbstkampagne vom Hauptsitz in Zürich haben wir eine Influencerreise mit dem Paar @zweidiereisen ins Engadin organisiert. Auf diese Weise wurde der sinnliche Herbst auf Social Media in Deutschland promotet. Die Reise fand vom 4.-8.10. statt und hat eine gute Reichweite erzielt.

Influencer Reisen @bringflavorhome: Für die Influencerin @bringflavorhome, haben wir eine auf Wein ausgerichtete Genussreise ins Tessin erstellt. Die Reise fand vom 24.-27.09. statt.

KAM

Switzerland Travel Mart 2023, Genf: 28 kuratierte Reiseveranstalter und Reisebüros. Generieren 2023 rund 500k Übernachtungen.

Webinar Jura 3 Seen-Land: 42 Teilnehmende via MS Teams. News aus dem Jura 3 Seen-Land sowie News seitens ST.

Meet & Greet Graubünden, Nürnberg & Wiesbaden: 14 teilnehmende Reisebüros und Reiseveranstalter in Wiesbaden mit Präsentation von ST und Graubünden, Schweizer Apéro und Menü. 16 teilnehmende Reisebüros in Nürnberg.

Meet & Greet Ticino, München & Frankfurt: 26 teilnehmende Reisebüros und Reiseveranstalter in Frankfurt bei Radio Frankfurt mit Präsentation von ST und Tessin, Schweizer Menü und inklusive Radio-Interview mit den Partnern aus dem Tessin. 35 teilnehmende Reisebüros in München im Restaurant Käfer.



Studienreise Willy Scharnow-Stiftung für Touristik: Vom 28.9. - 1.10.23 präsentierte sich die Stadt Bern den 13 teilnehmenden ReisebüromitarbeiterInnen.

MICE:

Sales Calls: Vom 25.-28.9. war SCIB Deutschland auf Sales Calls unterwegs mit 3 Partnern aus der Region Luzern-Vierwaldstättersee (Luzern Convention Bureau, Pilatus Bahnen sowie Radisson Andermatt). Besucht wurden Kunden in den Städt bzw. Umgebung von Stuttgart, Köln und Düsseldorf.

MICE Club Köln am 26.9. Das SCIB Deutschland präsentierte sich bei diesem Networking-Anlass ca. 40 Buyern aus der Region Köln/ Bonn.

Luxury loop MICE Autumn-Event vom 21.- 25.10. an der Costa Navarino in Griechenland. SCIB-Deutschland präsentiert sich hier u.a. in 1 to 1 Gesprächen und verschiedenen Networking-Anlässen ca. 60 Buxern aus dem Raum Deutsch-Österreich und der Schweiz.

Zürich MICE Days vom 26. - 28.10. mit Vertretung von SCIB Deutschland. Ca. 20 deutsche Eventplaner sind dabei.

Newsletter-Versand #3: Thema „Innovationskraft für Meetings und Events wurde an 1726 Empfänger versendet.

KMM

Referat bei Graubünden Ferien zu Reisejournalismus in Deutschland: Unsere Medienverantwortliche in Deutschland, Tassja Dámaso, hat am 10. Oktober in Thusis ein Gastreferat zum Reisejournalismus in Deutschland gehalten. Unter dem Titel “Quo vadis, Reisejournalismus” hat sie vor rund 30 Personen aus den Destinationen in Graubünden über den Status und die Zukunft des Reisejournalismus referiert.

Winter-Medienveranstaltung am 17.10.2023 in Berlin: Zur Lancierung der Winterthemen wurden in Berlin 30 Medienvertreter zu einem Abendevent willkommen geheißen. In einer Art Galerie mit Bewegtbildmonitoren wurde Bild- und Videomaterial der Partner aus Graubünden, Made in Bern, Wallis, Tessin und STS, sowie die Winterkampagne von ST abgespielt. Höhepunkt war die Präsentation der Themen in einer Game-Show. Drei Teams erspielten sich die Antworten in der Schweiz Version des Kinder-Spielklassikers: 1,2 oder 3. Nach dem Spiel war genügend Zeit zum Networking bei Schweizer Weinen und von Schweizer Gerichten.

Mediendinner Stammtisch Edition: Im gemütlichen Stammtisch-Ambiente wurden bei den Mediendinnern in Frankfurt, Stuttgart und Hamburg die Neuigkeiten unserer Partner Davos-Kloster, Winterthur und Arosa/Lenzerheide präsentiert. Bei einem Bierdeckel-Memory mit Motiven aus der Schweiz haben die insgesamt 40 Medienschaffenden auf spielerische Art und Weise mehr über die Fokusthemen erfahren.

Event mit SALON am 4.09.: In Kooperation mit Swiss Deluxe Hotels (SDH) und dem Magazin SALON fand ein festliches Dinner in Düsseldorf statt. Sternekoch Yannick Crepaux bekochte 80 hochkarätige Gäste, Leser und Leserinnen in Sammlung Philara für zeitgenössische Kunst. VR-Experience zur Grand Tour of Switzerland.

Gruppenmedienreisen:

Engadin - eine kulturelle Schatzkammer: Erfolgreiche Umsetzung einer Gruppenmedienreise nach Graubünden mit 6 Medienvertretern.

Entlang der Walliser Suonen: Erfolgreiche Umsetzung einer Gruppenmedienreise im Wallis mit 6 Medienvertretern.



Harmonie der Tessiner Gegensätze: Erfolgreiche Umsetzung einer Gruppenmedienreise im Tessin mit 6 Medienvertretern.

Individuelle Medienreisen: In den Monaten September und Oktober hat das KMM-Team Deutschland 31 individuelle Medienreisen in die Schweiz organisiert.

Mediennewsletter: Aussand des KMM-Newsletters im September und Oktober an einen Verteiler von 2400 Kontakten.

MICE:

Die Welt: Advertorial zum Thema Nachhaltig tagen in der Schweiz im Beileger „Geschäftsreisen“, Auflage: 126.304 Exemplare, Leserschaft: 846.000 Leser.

Conventional International; Nachhaltigkeits-Advertorial in der Fachzeitschrift.

Future Activities

Gruppenmedienreise Schokolade 2.0 in Kooperation mit Chocosuisse: Wir wiederholen die Schokoladenreise aus dem kommenden Jahr im November mit anderen Regionenpartnern. Zugesagt haben hochkarätige Medien wie Süddeutsche Zeitung, taz, dpa, BILD oder Augsburger Allgemeine.
Mediendinner Cities mit allen A-Städtepartnern in München am 14.11.2023

Interesting observations

Relaunch MERIAN als multithematisches Magazin im Jahreszeiten Verlag für eine Premium - Zielgruppe. Erstausgabe erschien am 20.10.2023 mit monatlichen Hotel-Rezensionen. Auch für Hotel-Neueröffnungen eine interessante Plattform.

Geo online mit neuer Reiseressortleitung: Katja Senjor war zuvor bei dem eingestellten Titel von Gruner und Jahr, Geo Saison.

Management-Buy-out SALON: Redaktionsleiterin Anne Petersen gibt das Magazin SALON nun selbst heraus.

News Brigitte: Chefredakteurin Brigitte Huber verlässt das Frauenmagazin (RTL Media).

News Manager Magazin: Chefredakteur Sven Clausen verlässt das Magazin und geht zum Redaktionsnetzwerk Deutschland, das zur Madsack-Mediengruppe gehört.



1. Priority Markets

GREATER CHINA

Market Situation

Market Situation

- The market saw a great momentum during the Summer, despite limited capacity. The recovery rate is positive also in comparison to other European and international destinations.
 - In September Greater China has reclaimed its place as the No 1 market for Switzerland Tourism in APAC.
 - Geopolitical tensions and economic uncertainty are still prevailing and dampening consumer sentiment. High level meetings at the recent APAC meeting in San Francisco have eased tensions a bit for the time being.
- ST is confident for a solid Winter season from Greater China.

Best practice competitors

- Saudia Arabia is investing heaps of money and operating on a high governmental level to push tourism from China to Saudi Arabia.
- Spain had a strong recovery, thanks to intensified investments and a high level of activities. Also due to competitive prices compared to other European destinations.
- Thailand launched a new and easier visa processing for Chinese travellers. This boosted trips to Thailand only moderately as uncertainties in respect to safety prevail.

Campaigning & Activation

- The one week winter roadshow concluded end of October
- Currently, we are running a swisstainable campaign together with our swisstainable destination partners on the up and coming Chinese OTA Mafengwo (Hornet's Nest)
- A SEO push campaign is planned for the market Hong Kong to promote the winter destination Switzerland.

KAM

- Visa concerns are still a top priority for KAM in China
- A visa workshop and red carpet system is planned for early 2024



KMM

- In October we have concluded several winter kick-off press conferences and attended the opening of the World Winter Sports Expo in Beijing, which gathered a lot of media attention as well.
- ST was able to push sustainable development of winter sports destination as well as global expertise and top class level of winter sports resorts
- Recently, media interest in outbound travel to Switzerland has remained high, with concerns about flights, visa and recovery rates still dominating
- October also saw a return of many media and KOL trips from China to Switzerland, with overwhelmingly positive feedback from participants

Future Activities

SCIB:

- IBTM Barcelona: 28 -30 Nov 2023
- Webinar training: 22 Nov: Zurich, 12 Dec: Geneva.



1. Priority Markets

ITALY

Market Situation

Gotthard Base Tunnel - update:

The re-opening of the tunnel is postponed until end of 2024.

Nevertheless no negative impacts on the sales are measured until now by our trade and train partners.

Trenitalia reached a historical success year of Eurocity tickets sales and we will continue the collaboration despite the challenges of the Gotthard tunnel.

Economy:

Italian economy weakened in the third quarter and 2023 GDP would rise by 0.7%.

Campaigning & Activation

RF Grand Train Tour Campaign 2023 – Italy

Period: 31.08 - 09.09.2023

What: DOOH campaign with Roger Federer / GTToS snippets at 80th International Film Festival in Venice

1 Giant LED (Main) Screen (24sqm) next to the red carpet

1 Giant LED Screen (12sqm) back-to-back with main screen in the accreditation area

Video plays: 2.376

Visitors: 230.000

Partners: STS

Campaigning&Activation: Swiss Family Village to promote autumn, Swisustainable, family and panoramic trains

Period: 20.09. - 01.10.23

Promotional & digital campaign to launch a new focus on the family & generation Z segment: public event in Piazza Gae Aulenti to experience outdoor activities, promote partner content, autumn and Swisustainable.

-Activities: albering, pump track, climbing wall, cinema, fairy tale hours, on&offline game, workshops

-Participants: school kids and public

-Booking platforms for outdoor activities, cinema and workshops: Eventbrite and APP Portanuova

File rouge the public transport system and the Eurocity connection between IT&CH.



Partner: Made in Bern, Ticino, Zurich, STS, RhB, HoKo

Partner for Workshop Activities: Trauffer, Märklin, UNESCO

Audience: 20k

School kids: 500

participants at activities: 2'000

e-newsletter collected: 900

participants at game: 170

Campaigning&Activation: DOOH Swiss Family Village to promote autumn, Swisstable, family and panoramic trains

Date: 20.09.-01.10.2023

What: Big Ledwall DOOH to promote Swisstable, panoramic trains, autumn, family hotels and KP content

Partner: Swiss Travel System, Made in Bern, Ticino, Zürich

Contacts: 1,2mio

KMM/Promotion: Opening Swiss Family Village to promote Summer/Autumn in Switzerland, Swisstable, and panoramic trains with focus on family and generation Z

Date: 21.09.23

Opening of Swiss Family Village with our brand ambassadors Michelle Hunziker and Yann Sommer

Focus on autumn highlights and activities for family

Participants: 50 journalists and 86 partners & guests

Partners: STS, Made in Bern, Ticino, Zurich

Campaigning&Activation: Swiss Family Village - DOOH with IGP Decaux

Period: 18.-24.09.2023

What: DOOH campaign in Milano with 50 frames in key metro stations to promote the Swiss Family Village in Piazza Gae Aulenti

Impressions: 3'985'390 impressions

Partners: HoKo, Made in Bern, RhB, STS, Ticino, Zurich

Campaigning&Activation: Swiss Family Village - IG Reel & Stories Yann Sommer

Date: 25.09.2023

What: Publication of an Instagram Reel on @myswitzerlandit in collaboration with new ST ITA ambassador Yann Sommer to promote the Swiss Family Village in Milano. Single stories by Yann Sommer during the opening event of 21. September,

Contacts:



Partners: HoKo, Made in Bern, Rhb, STS, Ticino, Zurich

Campaigning&Activation: Swiss Family Village - Stories Michelle Hunziker

Date: 21.09.2023

What: Presence of ST ITA ambassador Michelle Hunziker at the media and opening event of the Swiss Family Village in Milano, coverage of the event with

Partners: HoKo, Made in Bern, RhB, STS, Ticino, Zurich

Campaigning&Activation: Swiss Family Village - distribution ST Magazines and Partner Brochures

Period: 20.09. - 01.10.23

What: distribution of ST and Partner Brochures during public event Swiss Family Village

Partner: Made in Bern, Ticino, Zurich, STS, RhB, HoKo

ST Magazin: Svizzera 7 - 1000 pcs / Svizzera - Itinerari circolari - 1000 pcs / Swiss Family Hotels & Lodging 2023 - 1000 pcs / Swiss travel Maps 500 pcs / Svizzera Mobile 200 / myGrandTrain Tour Booklet EN - 500 pcs

Campaigning & Activation: MRAG Region - Influencer Trip Petra Cola

Period: 04. - 07.09.23

What: Influencer trip to Leukerbad and Aletsch Arena with Petra Cola (134k followers)

Content: 2 posts, 2 reel, min. 4 stories /day

Partner: MRAG, STS

Contacts: 120k

Campaigning & Activation: Vaud Promotion - Influencer Trip Francesca Giovinazzo and Tommaso Fogliata

Period: 09. - 10.09.23

What: Influencer trip to Lausanne and Montreux with Francesca Giovinazzo and Tommaso Fogliata IG Account takemyhearteverywhere (979k followers) and @travellingthroughtheworld (3,2mil)

Content: 3 posts, min. 4 stories /day and 1 post and 5 stories

Partner: Vaud Promotion

Campaigning & Activation: Lugano - Influencer Trip Giorgio Rocca

Period: 05.10.2023

What: Trip to Lugano with Giorgio Rocca (53K followers)

Contents: 1 post and stories

Partner involved: Lugano Region

Campaigning&Activation: Vaud Promotion - Influencer Trip Filippo Flora & Filippo Cirulli



Period: 17. - 19.10.23

What: Influencer trip to Lausanne and Montreux with Filippo Flora (180k) and Filippo Cirulli (152k)

Content: 1 posts, min. 4 stories /day

Partner: Vaud Promotion

Campaigning&Activation: Influencer Trip Giovanni Arena - Panoramic Train Routes

Date: 24 - 27.10.23

What: Giovanni Arena, IG @giovanniarena - 541k followers, TikTok 1,3mio followers / Influencer Trip to experience the autumn in Switzerland travelling with panoramic trains

Route: Montreux - Broc - Goldenpass - Interlaken - Zentralbahn - Luzern - Bürgenstock - Rigi - Arth Goldau

Content: 2 reels, 2 Tiktoks, 28 stories

Partner: STS, Luzern

Ctc: 3 mio

Campaigning&Activation: Lugano - Influencer Trip Filippo & Filippo

Period: 25 - 26.10.2023

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

Contents: 1 post and stories

Partner involved: Lugano Region

Campaigning&Activation: Vaud Promotion - 2 pages adv in ballet program of "Teatro alla Scala" Milano - Il Lago dei Cigni

Date: 15.09.2023

2 pages advertising in the ballet program Il Lago dei Cigni of "Teatro alla Scala", which is distributed to all guests on location.

5'000

Partner: Vaud Promotion

Campaigning&Activation: Vaud Promotion - 2 pages adv in opera program of "Teatro alla Scala" Milano - Il barbiere di Seviglia

Date: 15.09.2023

2 pages advertising in the opera program Il Barbiere di Seviglia of "Teatro alla Scala", which is distributed to all guests on location.

5'000

Partner: Vaud Promotion

Campaigning&Activation: Vaud Promotion - 2 pages adv in opera program of "Teatro alla



Scala” Milano - Le nozze di Figaro

Date: 15.09.2023

2 pages advertising in the opera program Le Nozze di Figaro of “Teatro alla Scala”, which is distributed to all guests on location.

5'000

Partner: Vaud Promotion

Campaigning & Activation: Golf tournament Swiss Cup at Menaggio-Cadenabbia Golf Club

Date: 15.10.23

Golf Tournament Swiss Cup at Menaggio & Cadenabbia Golf Club

Distribution of ST brochure

Apero with Swiss Cheese

Participants: 120

Campaigning&Activation: Distribution Touring brochures with Donna Moderna

Date: 26.10.2023

Distribution of Touring brochures with weekly magazine Donna Moderna

Circulation: 29'000 copies

Area: Lombardia

Digital: Swisstainable - Google Ads

Date: 06.04. – 30.09.2023

Search engine marketing campaign to promote sustainable tourism - link to dedicated webpages in MyS

Search in target, northern Italy

Contacts: 226.169

Digital: Swiss Family Village – Teads

11.09.- 01.10.2023

Native advertising to promote Swiss Family Village in Milano

Link to svizzera.it/swissfamilyvillage

Geotarget Milano area

Contacts: 1.703.090

Digital: MRAG Region - Influencer Trip Petra Cola

Period: 04. - 07.09.23



What: Influencer trip to Leukerbad and Aletsch Arena with Petra Cola (134k followers)

Content: 2 posts, 2 reel, min. 4 stories /day

Partner: MRAG, STS

Contacts: 120k

Digital: Vaud Promotion - Influencer Trip Francesca Giovinazzo and Tommaso Fogliata

Period: 09. - 10.09.23

What: Influencer trip to Lausanne and Montreux with Francesca Giovinazzo and Tommaso Fogliata IG Account takemyhearteverywhere (979k followers) and @travellingthroughtheworld (3,2mil)

Content: 3 posts, min. 4 stories /day and 1 post and 5 stories

Partner: Vaud Promotion

Digital: Bern Region – Teads

Date: 01.09 – 31.10.2023

Native advertising to promote Autumn activities in the Bern Region

Link to svizzera.it

Geotarget Lombardia - Piemonte - Liguria - Emilia Romagna

Format: Inread display cpc - single image, text and cta

Contacts: 21.679.346

Sessions: 91.965

Digital: Ticino_Autumn - 3B Meteo

23 - 31.10.2023

Dsplay advertising on 3B Meteo App.

Link to Ticino Autumn page in MyS.

300x250

Digital: Social Media Package: Geneva.

Period: June - Oktober

What: Social media campaign on ST Italy owned channels:

- 2 Facebook posts
- 2 Instagram posts
- 1 themed week with IG Stories about Unexpected Geneva

Partner: Geneva Tourism

Story week: 05.-10.06.23 (14.352 views, reach 16.372)



Post IG: Swiss Wine Tour 13/09 (5'100 imp, eng. 203)

Post FB: Cern 03/10/23 (8.400 imp, eng 228)

Digital: ST E-Newsletter September.

Date: 5.9.2023

What: ST E-newsletter September

Focus:

- Swiss Family Village (74 clicks)
- Autunno svizzero (65 clicks)
- Sent: 15'895
- Open rate: 39.75%
- Total Clicks: 1094

Digital: E-Newsletter October.

Date: 05.10.2023

What: ST E-newsletter October

Focus:

- Inaugurazione del CERN Science Gateway (112 clicks)
- Dinosauri e fossili sul Monte San Giorgio (49 clicks)
- Sent: 16'205
- Open rate: 38.14%
- Total Clicks: 1342

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Switzerland Travel Mart in Geneve. Date: 11-14.09.2023

Participants: 4 t.o. from Italy (Il Girasole Viaggi, Adrastea Viaggi, Tiqets, Italy First)

Trade Event to promote KP partner destinations on the 20.09.2023

during preopening of the Summer/Autumn Village in Piazza Gae Aulenti in Milano. Organization: Tourist Trend

42 companies, 60 people

World Tourism Event in Turin

Date: 21-23.09.2023. Exhibition space for the World Heritage Sites and the b2b workshop reserved for Italian and International professionals.



In cooperation with HoKo Focus: Workshop (21.09.23), presence in fair and participation in panel.
Visitors: 5.000

Fam trips

1. Dates: 21-23.09.2023

Focus: Geneve, Zuerich, Hotel of DH chains

Contacts: 4 t.o. and 2 trade magazine

2. Dates: 05-07.10.2023

Ticino in Montegeneroso, battello sul lago di Lugano, LAC, Monte Tamaro, Swiss Miniatur, Bellinzona

Contacts: 6 (4 tour operators and 2 media trade)

Special Event

Trade workshop for 60 travel agents from Italy in Thun/Spiez on the 19.10.2023

Focus: Trenino Verde delle Alpi

In coop with BLS, Interlaken T., Adrastea Viaggi, STS

eNL IL Cioccolato

1. Date: 18.09.2023. Focus: Swiss Family Village, offers for families

Opening rate: 20,6%. Clicked: 2%

Link: <https://newsletter.gadmin.ch/campaigns/reports/viewCampaign.aspx?d=r&c=357B94C62135C561&ID=3795D14B05AAA3862540EF23F30FEDED&temp=False&tx=0&source=Report>

2. Date: 10.10.2023. Focus: TTG Rimini Fair, with offers for families, GTToS, panoramic trains, city break

Opening rate: 29,6%. Clicked: 0,3%

Link: <https://newsletter.gadmin.ch/t/r-DF537EE1C00143032540EF23F30FEDED>

Fair

TTG Rimini Fair from 11 to 13/10/2023

What: presence with a stand in one of the major touristic fair B2B in Italy

Partners: STS, RhB, Adrastea Viaggi

VR Experience with 4 Oculus

150 people experienced it

KMM

Media results



- 25 million
- 22 journalists invited to Switzerland
- 2 media newsletter about Swiss Family Village & Autumn / Christmas in CH and Eurocity special fare "Promo 2x1 Mercatini"

Top coverage

- TV broadcast Donnavventura on Rai2 about Grand Tour (audience: 482'000; publication date: 10.09)
- TV broadcast TG on RSI about Swiss Family Village (audience: 200'000; on air: 22.09)
- TV broadcast Melaverde on Canale5 about Valposchiavo, S-Chanf and RHB (audience: 1,6 million; on air: 01.10)
- TV broadcast Melaverde on Canale5 about sustainable projects in Valposchiavo (audience: 1,8 million; on air: 22.10)
- TV broadcast Linea Verde on Rai1 about Ticino (audience: 2,7 million; on air: 22.10)
- TV broadcast TG2 Tutto il bello che c'è on Rai2 about Science Gateway (audience: 800'000; on air: 26.10)
- Article on Lastampa.it/viaggi about Luzern as mecca of classical music (contacts: 55'000; publication date: 14.09)

Group media trip

- Trip in Vaud (14-16.09.2023) focus on Lavaux, Chaplin's World and Olympic Museum in Lausanne; Participants: 4 journalists and 1 tv troupe.
- Trip in Interlaken Region (11-13.10.2023) focus on Trenino Verde delle Alpi and water sports; Participants: 4 journalists.
- Trip in Geneve (27-29.09.2023) for Science Gateway opening; Participants: 5 journalists and 1 tv troupe.

Media Meeting

- Media event with Michelle Hunziker and Yann Sommer (21.09) for Swiss Family Village official opening; participants: 50 journalists and 100 guests
- Exclusive media meeting in Firenze (03.10) with Interlaken & BLS; participants: 28 journalists
- Exclusive media meeting in Milano (05.10) with Wallis and Aletsch Arena; participants: 41 journalists

Future Activities

Sales push with Trenitalia/STS:

Christmas market (cities campaign) promotion with Trenitalia: 2for1 Eurocity tickets 1- 20th Nov. 2023:

Partner integration (Vaud)

Push Christmas market content with MH together with Basel tourism, Bern tourism.

Follow-up collaboration with Giorgio Armani:

Event in St.Moritz (100 VIPs /influencers/media) during Sant'Ambroggio weekend (first & most

Switzerland Tourism.



important promotional winter weekend of Italians): Partner integration (St.Moritz Tourism)
Top Influencer Sant'Ambroggio weekend (7-10.12.2023): Chiara Ferragni hosted in St.Moritz (30 Mio. Followers) -> winter push!



1. Priority Markets

NORTH AMERICA

Market Situation

From January to September the overnights produced from the USA increased by 21% compared to 2019. We expect this to continue in 2023 but predict growth to come down to single digits in 2024.

The strong recovery from the US, coupled with global passenger traffic in 2024 expected to fully recover and surpassing the year 2019 has led to more flight inventory to Switzerland being announced for summer 2024.

New Washington DC - Zurich with SWISS

New Toronto - Zurich with SWISS (seasonal in summer)

Increased inventory on Edelweiss routes from US/Canada to Switzerland

New Atlanta - Zurich with Delta

Campaigning & Activation

Campaigning & Activation

- CTV campaign for Glacier Express, mid-Aug - mid-Sept
- GTOS campaign w/ Hearst/Elle, mid-Aug - mid-Oct
- Valais Matterhorn campaign w/ Nico Hischier, mid Sept-mid-Oct
- Hotel campaign w/ AFAR, 2nd wave, Aug-Oct
- Winter Campaign w/ T-Mobile, Sept-Nov
- Zurich Campaign in SF, Sept-Oct
- Media Trip for next year's Timeout Campaign, Oct
- TSQ billboard, ongoing
- FB sweepstake, ongoing

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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 SWISS, 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

SCIB

- Cadence Webinar, September 14
- Prestige Event, MN, September 27
- DW Educational Trip, October 4 - 8
- IMEX America, LV, October 17 - 19

KMM

- Meet the press in Vancouver, Seattle and LA 14-22.09
- TV production The Epic Trail for Liechstentein and Engelberg 28.08-9.09
- Influencer collaboration for St Moritz and St Gallen with Leandra Medine Cohen 8-14.09
- Collaboration with KOL Joe Hansen + filming "be Smart" for PBS for CERN and EPFL-starts up 16-23.10
- Collaboration influencer Renee Hahnel Liechtenstein 22-30.09
- Group Press Trip STS in Zermatt, Lucern and Gstaad 10-16.09
- TV production for TV5 (Quebec) in Brienz, Valais 16-28.09
- TV production Lucerne with Davy Sutton, travel segment on weather.com 10-16.09
- Swiss talk by CERN to introduce new Science Gateway 18.10
- Photoshoot for SSENSE x Jacquemus in Graubunden 25-27.10

Future Activities



KAM

- ST Trade webinar with STS, November 2
- Cinemania Montreal, November 1 - 3
- Ensemble Horizons Conference, November 2 - 6
- Signature Travel Network Conference, November 6 - 9
- ST Trade webinar with Schilthorn, November 16
- ST Trade webinar with Lausanne, November 30
- BE 24 hours Trade event NYC, November 30
- USTOA Los Angeles, December 2 - 6
- ST Trade webinar "Christmas Magic in Switzerland", December 14

SCIB

- Global Incentive Summit, Portugal, Nov 8 - 11
- ICCA Congress, Bangkok, Nov 12 - 15
- SITE/MPI Chapter Events, Toronto, Dec 4 - 5, tbc
- M&I Luxe, Mexico, Dec 11 - 14
- Engage, Boca Raton, Dec 11 - 14
- Association Eblast, Dec 18
- Holiday Eblast, Dec 19

Campaigning & Activation

- Winter Campaign w/ T-Mobile, Sept-Nov
- TSQ billboard, ongoing
- FB sweepstake, ongoing

KMM

- Extravaganza Media Event in New York 30.11
- Le Salon Suisse in Miami 6.12
- Meet the Press Chicago and San Francisco 7-8.12



1. Priority Markets

UK/IRELAND

KMM

5 September: Media Winter launch with partner Bern, 47 media attended

6 September: PR agencies exchange (regular exchange with agencies that represent Swiss destinations or properties)

12 September: Participation in Paddy Daly Ski Launch

25 September: Participation in Verbier media event in central London

2 October: Media Event with partner Ticino, 20ish media attended, collaboration with UT for their 150th anniversary

3 October: Participation ATN. AH on podium, media networking

5 October: Participation in winter event Crans-Montana as guest for networking

6 October: Distribution of October NL to media contacts

9-12 October: The Great Swiss Train Chase, 4 influencer on a chase through Switzerland (project for STS, initiated by ST LON)

23 October: Participation in Travel Media Awards Ceremony as guests



2. Active Markets

AUSTRALIA

Market Situation

News Corporation released their Half Yearly Travel Trends results. Below is a summary of some key outcomes specific to the Australian market.

- Travel is the #1 pursuit for Australians who feel youthful (not defined by age). Rapidly growing sentiment to travel in order to connect with our most youthful self.
- However this youthful optimism is challenged by world events. Australians are very influenced by how safe we feel. (World events may have a positive impact on encouraging domestic travel into 2024).
- Travel has fundamentally evolved from one of our most valued pastimes to an essential vehicle for our self-betterment.
- Travel is not negotiable, despite the rising cost of living.
- Holidays were once simple breaks from everyday life, now we are looking for transformational experiences that last beyond the time away.
- Qantas announced for the first time they will operate a non-stop service from Perth to Paris commencing in June 2025. (This will complement their non-stop service from Perth to Rome).
- Austrian National Tourism Office announced that they will no longer maintain an Australian-based representative. Instead the market will be serviced by Singapore. ANTO however will continue to invest the same marketing budget into Australia, so will retain an active trade and consumer presence.

Best practice competitors

The Italian National Tourism Board INTB reported a fivefold year-on-year increase in Australia visitation to Italy between April 2022 - April 2023. Some of which is attributed to “The White Lotus” effect from the popular Netflix series.

In 2024 INTB will focus on “roots” tourism in Australia, focusing on around 1.2 million Australians of Italian descent and encouraging visitation to smaller regional areas to discover ancestral ties to villages and municipalities.

In addition to Italy, Greece experienced record summer visitation from the Australian market, achieving 10% growth in 2023 compared to June - August 2019.

Campaigning & Activation

- The Travel Corporation (Trafalgar Tours) digital campaign completed in Oct.
- Rail Europe launch a B2B sales incentive to win a place on a fam trip to Switzerland.
- Finalised Entire Travel campaign with support from ST/STC/STS to launch mid Dec.



- Finalised Inspiring Vacations campaign featuring print & digital promotion of GTTs (summer and winter programs) as well as EDMs.
- Commenced work on KarryOn trade media campaign in cooperation with Collette Tours. This is a multi faceted campaign including video, editorial, trade competition with daily inclusions in KarryOn commencing 30 Nov for 12 days.

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- Numerous introductory sales calls across Melbourne and Sydney (with Sandra as new MM).
- Webinar with partners from Zurich, Lucerne and Interlaken - 250+ travel agents registered participation.
- Hosted trade lunch for 25 agents in Canberra in conjunction with Rail Europe.
- Participated in roadshow event in Melbourne and Sydney with ETC - 60 agents each event, with 10 presentations each evening to small groups.
- Finalised arrangements for trade fam trip departing on 28 Nov - Winter & Christmas Markets - 8 travel agents.

KMM

- Finalised paid campaigns DPS in print as follows:
 - MindFood magazine on the Ticino region.
 - STS in International Traveller.
- Finalised digital & video campaign with Get Lost media who spent a week in Zurich & Lucerne. Campaign launch live mid November.
- Campaign with Zermatt a WIP with International Traveller.
- Received two interesting broadcast proposals for 2024; Top Gear production through the BBC Network and Passport TV on the Seven Network, a new travel program launching in 2024.

Future Activities

- Attend National Tourism Industry Awards (NTIA) events over two evenings as finalists in the Most Popular Tourism Board category.
- Launch of KarryOn B2B media campaign on 30 Nov.
- VIP Luncheon at Swiss Consul Residence on 01 Dec.
- Hosting table and sponsorship through ETC at CATO (Council of Australian Tour Operators) lunch on 07 Dec.
- Finalise content for Luxury Traveller campaign.



2. Active Markets

AUSTRIA/HUNGARY

Campaigning & Activation

- 21. August - 30. September 2023: 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 kampagnenspezifischer Microstire auf MyS
- 4.-30. September 2023: Recoverykampagne „Herbst in der Schweiz mit allen 5 Sinnen“ mit eigenem Channel auf Oe24.at
- Weekend Gewinnspielkampagnen mit Rausch Nachbericht erscheint am 28. September 2023 im Weekend Style
- 18. Oktober 2023: STS-Advertorial zu den Panoramabahnen im Like It Magazin, 40'000 Auflage
- 22. Oktober - 19. November: crossmediale Panoramabahnenkampagne in Kooperation mit STS, RhB inkl. Gewinnspiel (Print-Einschaltungen Krone Bunt & Kurier am 22.10, 2. Kurier-Promotion am 26.10 sowie Onlinegewinnspiel auf krone.at und eine Digitalkampagne mit Native, Display und SoMe Ads)

KAM

- 12. September 2023: B2B eNewsletter an 197 Kontakte geschickt
- 11.-14. September 2023: 7 Teilnehmer aus Österreich beim STM
- 17.-18. Oktober 2023: Workshop Reihe Wien, Linz und Salzburg mit Schweizer Partnern - gesamt 51 Personen vor Ort getroffen; Während der Verkaufsreise wäre noch eine separate Agentenschulung bei Sabtours vorgesehen, allerdings wurde hier kurzfristig mangels Teilnehmerzahl beschlossen, die Agenten zur Verkaufsveranstaltung in Linz einzuladen.

KMM

Pressekonferenz:

19. Oktober 2023: Herbst & Winter-Presserühstück in Wien mit STS für 20 österr. Medienvertreterm

Medienreisen:

- 14.-17. September 2023: Gruppenmedienreise Luzern-Interlaken-GoldenPass Express-Montreux in Kooperation mit KAM Raiffeisen Reisen für 6 österreichische Journalisten
- 5.-8. Oktober 2023: Swisstainable-Gruppenmedienreise nach Andermatt & Zürich mit ÖBB & STS für 5 österreichische Journalisten
- 6 weitere österreichische Medienverter auf ind. bzw. int. Medienreise in der Schweiz

Presse e-Newsletter:



Im September und Oktober 2023 wurden 2 Presse eNewsletter mit ST- und Partnernews an je 191 österr. JournalistInnen versendet.

Tourismuspresse.at-Aussendungen:

Im September und Oktober 2023 wurden 5 Tourismuspresse.at-Aussendungen an je ca. 33'500 Kontakte versendet.

Future Activities

- Anfang November 2023: KAM Busmailing
- 1. November: Swisstainable ÖV-Advertorial im Reisen Magazin
- 20. November: Corps Touristique Galaabend
- 22. November: Bern-Advertorial im Entdecken Magazin
- 15. Dezember: Promotion Panoramabahnen im Winter im Gute Reise Magazin
- Dezember: B2B eNewsletter



2. Active Markets

BRAZIL

Market Situation

MAIN FACTS ABOUT THE MARKET

More recent data shows that the Brazilian economy is still in full expansion by growing 0.9% in the second quarter this year. Among The sectors, only the agribusiness showed a negative variation of -0.9%, but this was already expected in the face of the excellent first quarter that it presented, with an increase of 21.6%. In the value accumulated in one year, the country grew 3.2% according to the Gross National Product's disclosure by IBGE.

In spite of the good news, it's important to highlight that the gross fixed capital formation (aka investments) was practically stable in the period, and it was the only one to retreat in the yearly comparison, with a variation of -2.6%. It is a red flag because investments are essential for a sustainable and long-term growth. It is a restrainer, indeed, but nothing that interferes with the current trend – a positive one – of the economy.

Another disclosure that brings more optimism for the domestic scenario was the inflation in August that rose 0.23% and accrued 4.61% in 12 months. The group that most impacts on consumers' wallets, food and beverages, presented a deflation for the third consecutive month, currently -0.85%.

Certainly, the prices being lower bring relevant benefits to Brazilian consumer's day to day, with an increase in the buying power.

At the same time, the job market also contributes to increasing the capacity of families' consumption. From January to July, it were 1.17 million new formal job positions created, according to CAGED (General Register of Employed and Unemployed Workers), of the Ministry of Labor. IBGE's data also confirms this favorable trend, with the reduction in a year, from 9.1% to 7.9% of unemployed people.

And with higher income, it is natural that the main economic activities feel this reflection, like the commerce that grew 2.4% in July in the yearly comparison and accumulates a 1.5% increase in the year, according to IBGE. It were five activities out of eight that registered an increase, and what's interesting is that even those that are more sensitive to credit also performed positively, which it's the case of furniture and household appliances that presented an increase of 3.4%.

Although the default rate is still high in the country, the credit continues quite abundant in the market, which allows the preservation of families' consumption. Just to have an idea, the available resource balance to obtain credit for an individual person rose 10.4% in 12 months, and the concessions, which are the resources contracted by consumers, grew 12.4% in the same period, according to a Central Bank's report.

And since July, the Desenrola program is in force, which allows the renegotiation of debts with financial institutions and commerce stores, contributing gradually to the reduction of the default rate. Besides the retail, the services also have benefited from the increase in the capacity of families' consumption and from the investments of companies. The sector pointed out a 3.5% increase in July in the yearly counterbalance, and accrues 4.5%, according to the disclosure of IBGE. It can be underlined that all the five analyzed groups in the survey present a positive variation, which shows a widespread growth by the sector.

And FecomercioSP's data on the revenue from national tourism shows that the sector follows a strong rhythm of movement and is still in the spotlight. In July, the turnover of R\$ 16.1 billion exceeded by 3.3% the one from the same period last year and accumulated an increase of 12.4% in a year. The industry is more isolated and hasn't followed the other economic segments. In the last data disclosed



by IBGE, in July, there was an annual retraction of 0.6% and accumulates a downturn of 0.4%. The industrial production decreased in 14 out of the 15 analyzed states by the institute, indicating the great negative impact of high interest and the reduction in investments.

The trend, in general, continues to be favorable for the Brazilian economy, especially with the start of the interest rate reduction cycle. Currently at 13.25% a year, but it should end the year slightly below 12% and return to the one-digit threshold by mid-2024. Certainly, this will speed up companies' investments, given the credit becoming cheaper. With the approval of a reasonable tax reform plus a credible fiscal framework, the atmosphere for investments can return stronger and also help the country with further growth, with a solid job generation and income distribution.

IMPORTANT FACTS

1. Brazilian families withdrew 331.7 billion reais from saving accounts in August, outnumbering the inputs, which generated a negative balance of R\$ 10 billion, according to the report of the Central Bank. These resources can assist with the payment of overdue bills.
2. According to the National Confederation of Commerce (CNC), in August, there was 30% of families presenting overdue bills, a percentage slightly higher than the one seen in the same period in 2022, of 29.6%.
3. A new estimation for the grain harvest in 2023 increases the record forecasted at 313.3 million tons, a 19% increase in relation to last year's value.

CONFIDENCE INDEXES:

The Consumer Confidence Index (ICC) progressed 5.3% in August and reached the highest level since February 2020, totaling 131 points. The rise is mainly related to the lower inflation and a decrease in food prices, a group that most impacts on consumers' wallets. At the same time, the job market continues to be heated in the capital, which contributes to the gain of buying power.

The Trade Entrepreneur Confidence Index (ICEC) grew for the second month in a row and reached 107.8 points, a monthly increase of 2%. However, in the comparison with the same month in 2022, there was a 9.2% decrease. Although consumers are improving their income, business owners still suffer with the elevated costs and that pressure sales' results.

TRAVEL AND TOURISM

The Travel and Tourism industry in Latin America will exceed 2019's numbers by the end of the year, a lot due to the strength of its domestic Tourism (Mexico and Brazil at the head) reaching US\$ 62.1 billion in transactions – around R\$ 310 billion. An increase of 29% over 2022, which had already grown 37% over the still worn-out year of 2021. The lowest point was achieved, obviously, in 2020, totaling US\$ 23.4 billion, a 59% decrease compared to the US\$ 57.4 billion in 2019.

The exclusive data is from the study "Latin America Travel Market Report 2022" prepared by Phocuswright, already available on the website of the market analysis and research company. "Despite the political, economic, and social turmoil that affects the region as a whole, Tourism is empowered and will fully overcome pre-pandemic levels before originally forecasted, with domestic Tourism being the great protagonist in this upturn", said Carolina Sass de Haro, the director of Mapie, representative of Phocuswright in Brazil.

The company forecasts a still two-digit growth for the upcoming years, of 16% in 2024, reaching US\$ 71.8 billion; 14% in 2025, achieving US\$ 81.7 billion, and 12% in 2026, totaling US\$ 91.8 billion.

MEXICO AT THE HEAD

Considering 2022's data, Mexico is still the largest travel market in Latin America, with US\$ 24.6 billion. The country has already outperformed the pre-covid indexes with these figures from last year. As for the Mexican market, this upturn was driven by the international segment, which grew 28% in



2022 – it's worth recalling that Mexico had an open-border policy during the Covid-19 pandemic.

Mexico holds 51% of sales in Tourism in the region in 2022, and Brazil 33%; with Colombia presenting 9% and Chile 7%. Accounting only for online sales, Mexico keeps the 51%, and Brazil increases a little, totaling 34%.

ONLINE GROWS QUICKLY, BUT OFFLINE STILL CORNERS THE MARKET

Online sales in Latin America (mostly leisure direct sales, or without management) grew 22% in 2022 and should reach US\$ 30.1 billion in 2023. Offline sales are still the majority, with a forecast of US\$ 32.1 billion this year. Online sales' turning point, according to the Phocuswright's projection, would take place in 2025, totaling US\$ 41.2 billion from online sales, and US\$ 40.5 billion coming from offline sales. Last year, 53% of sales came from offline means, 25% from OTAs and 22% from suppliers' direct sales. For 2026, offline sales are expected to reach 49%, and the other two channels will hold 26% each, of Tourism revenue in the region. In other words, despite OTAs' positive growth, suppliers will attain higher gains and growths due to the investment in direct sales. One of these investments by suppliers is in mobile sales, which generated US\$ 0.6 billion in 2019 and will reach US\$ 6.3 billion in 2026.

THE HOTEL BUSINESS REIGNS

The largest segment in sales of the region in the Tourism industry is the Hotel Business, with 48% of the result of 2022 (US\$ 23.1 billion). The projection is that it keeps at the head by 2026, with a share of 47%, since the receptive and the domestic should keep growing in Latin America.

The air sector came right after with a sales share of 39% in 2022, with the region's leaders, like Latam Airlines, Avianca, and Aeromexico (the three coming out successfully of Chapter 11), reporting solid financial results. Taken together, the Hotel Business and Aviation add up 86% of sales in the region.

The car rental and operators' segments will have a positive growth in the next four years, but the sum of these two markets results in a share of only 14%, forecasted for 2026.

This year's air data shows US\$ 10.5 billion in offline sales, US\$ 7.3 billion in direct sales, and US\$ 6.6 billion via OTAs. The indirect sales represent, therefore, US\$ 17.8 billion, out of a US\$ 24.4 billion total.

In the hotel business, out of US\$ 29.4 billion projected for this year, US\$ 14.9 billion come from offline sales, US\$ 8.5 billion from OTAs, and US\$ 6 billion from direct sales, which should grow up to US\$ 9.7 billion in 2026, achieving the highest index among channels. The greatest hotel chain in the region is Accor, and the local companies that most stand out are the Mexican company "Grupo Posadas" and the Brazilian "Atlantica Hotels".

The travel operator segment holds the largest offline sales share: US\$ 4.8 billion out of a total of US\$ 5.3 billion forecasted for this year. Direct sales are only US\$ 400 million and via OTAs US\$ 100 million. However, the operators should only reach 2019's numbers, in 2026.

The major operator in the region is the Brazilian "CVC Corp", also operating in Argentina. As for the leading OTA, it's Despegar/Decolar, based in Buenos Aires. The OTAs, according to the study, continue to benefit from the fragmentation in the hotel business' distribution in the region, and should outnumber 2019's figures this year, totaling US\$ 15.7 billion in sales. The segment will lose share for suppliers' direct sales, according to the projection by Phocuswright.

BRAZIL RECOVERS IN 2023

Only this year, in contrast to Mexico, Brazil will outperform the revenue in Travel and Tourism of 2019, totaling US\$ 19.9 billion. The online insertion in the country should rise from 49% in 2022 to 53% in 2026, when the country reaches US\$ 27.9 billion in sales within the sector.

In Brazil, out of US\$ 19.9 billion forecasted for 2023, US\$ 10 billion come from offline channels, US\$



5.6 billion from OTAs and US\$ 4.4 billion from direct sales. For 2026, the projection is US\$ 13.2 billion for offline, US\$ 7.8 billion for OTAs and US\$ 6.8 billion for suppliers' direct sales.

The air sector represents, within the 2022 data, 49% of total sales, followed by the hotel business (29%), rental companies (12%) and operators (9%). See the complete study at phocuswright.com.

Campaigning & Activation

- Robb Report Day: **Sep, 23th**. Event at Fazenda Boa Vista (JHSF Group).

Robb Report magazine has organized a day full of experiences to the high-end customers/ readers. Audience: AAA, 400 guests. Switzerland Tourism Lounge.

- Digital STS Campaign - Excellence Program. **Sep** Campaign to promote the Excellence Program on Panrotas (B2B Media). Newsletter: Mailing composed by 27'000 e-mail address and article on Panrotas website – 1'500 readers.

- SWISS Newsletter including a Switzerland Tourism content.

Theme: Swiss autumn. Link to Swiss autumn movie - the season for our senses 30s+ | Switzerland Tourism.

- Digital Campaign on CZ Website. Banner online on Constance Zahn website.

Campaign for 3 months (SEP e OCT). Page views: 1.2MIO/ month

- The Switzerland Tourism Cup - Beach Tennis Edition. The tournament, held at Copacabana Beach from October 12th to 14th, was inspired by Roger Federer's campaign and featured various elements, including a backdrop with a television for the official 2023 movie (RF and TN) at the coverage area. A large banner outside ensured that everyone at Copacabana Beach could see this campaign. The Key Sponsors from Bern Region: Jungfrau Railways, Jungfrau Region, Interlaken and SWISS International Air lines. A press release was created to cover the Beach Tennis Pop-up at Copacabana beach. Total of Marketing contacts: 750'008. The Switzerland Tourism Brazil has created special contents related to the Beach Tennis Project during October 12th and 14th. During these 3 days the account @MySwitzerlandBR had 333 new followers and achieved 22.529 accounts having the total of 55.913 impressions and 2'518 visits on @MySwitzerlandBR. The total number of impressions on Social Media during these 3 days, combining @MySwitzerlandBR, guests, and @ofaustocarvalho, amounts to **1'027'000 impressions**.

- Crans-Montana Digital Campaign – Key Partner Package. Digital campaign to promote Crans-Montana / winter season between Sep, 18th and Oct, 18th

Google and Meta Campaign: 2'758'959 impressions and 78'629 clicks on Crans-Montana website.

- Swiss Digital Newsletter: **Oct 20th**. SWISS Newsletter including Switzerland Tourism content. Theme: Winter Sports

- Swiss fondue & wine at the Fazenda Boa Vista. Swiss fondue and wine event at Fazenda Boa Vista (JHSF Group), a luxury condominium located on the outskirts of Sal Paulo. Hosted by Adriane Galisteu @galisteuoficial, TV celebrity with 5.2 mio followers on Instagram. Audience: 4 families living in the condominium on 6th and 5 on the 7th.

KAM



- 4 Oct: STS dedicated newsletter focused on Excellence Programme sent to 26.500 travel agents by email, 160 corporate travel managers by email and 1.800 travel agents by WhatsApp. Link to newsletter <http://smtp.mailnewsdobrasil.com.br/email/SUICA-16-DE-24-2023/suica-16-de-24-2023.html>

- 10 Oct: Crans-Montana dedicated newsletter focused on Winter season and activities; luxury hotel partners; and b2b training video sent to 26.500 travel agents by email, 160 corporate travel managers by email and 1.800 travel agents by WhatsApp. Link to newsletter <http://smtp.mailnewsdobrasil.com.br/email/SUICA-19-DE-24-2023/suica-19-de-24-2023.html>

06-13 October 2023: Autumn fam trip with Orion Operadora

Zurich, Lucerne, Grindelwald, Interlaken, Geneva.

Participants: 2 Orion Operadora + 6 travel agents from Rio Grande do Sul.

Swiss Partners' support: Zurich Tourism; Lucerne Tourism; Montana Art Deco; Lucerne Lake Navigation Company; Mt Pilatus; Jungfrau Region; Jungfrau Railways; Romantik Schweizerhof; Interlaken Tourism; Swiss Travel System; MOB; Geneva Tourism; Swiss

- 19 Oct: Training Seminar - Teresa Perez Tours

Dedicated training seminar to Teresa Perez Tours

Goal: overview of the destination and Swiss Travel System.

Audience: 20 trade professionals (sales, operations, and product teams)

Switzerland Tourism presence: Mara Pessoa, Trade Manager

- 23-27 Oct: Zurich Sales Calls in Brazil

5-day sales calls agenda across 3 primary markets of Brazil: Rio de Janeiro, Porto Alegre, and São Paulo.

3 travel agent events, individual TO appointments, 10 training sessions.

Goal: Official launch of winter season, ST & LX Sales Incentive Campaign Follow up and Zurich updates.

Audience: 100+ trade professionals in one week.

Switzerland Tourism presence: Mara Pessoa, Trade Manager

Zürich Tourism presence: Aurelia Carlen, Area Manager Americas

Additional Swiss partners: SWISS

30 Oct: Online training, Winter Season Launch

Dedicated online training session about Switzerland with focus on the launch of winter season;

Session organized by Interep (Virtuoso) for travel agencies members of the group 'Integração trade'; 75 attendees;

Switzerland Tourism presence: Mara Pessoa, Trade Manager



KMM

- ST Brazil on Tv Band: he Market Manager Fabien Clerc was invited TV host Wilson Victorio Rodrigues to speak about the work of ST Brazil on the Entrepreneurs Channel of TV Band, one of the largest TV network in Brazil.

Broadcasted on TV media channel, YouTube and various social media including Instagram.Total Marketing Contacts: 635'000.

Future Activities

- Seeding activity for X-mas (Key contacts)
- Lunch for VIP to celebrate the opening of winter season.



2. Active Markets

CZECH REPUBLIC

Market Situation

- ON statistics August 2023/2022: +11,2 %; ON statistics August 2023/2019: +1,0 %
- ON statistics September 2023/2022: +2,9 %; ON statistics September 2023/2019: +13,1 %
- Mr. František Reismüller is the new CEWO of the state agency Czech Tourism. His main goal is to make the agency's marketing more effective, increase its transparency towards the public and strengthen multi-source funding, for example from the EU.
- Czechs travelling on exotic holidays can now choose from more direct connections. TO Fischer (part of) Der Turistik launched direct charter flights with Airbus A350-900 (World2Fly) to Vietnam, Cuba, and Dominican Republic. TO CEDOK use Boeing 787 (LOT) for direct charter flights to Madagascar, Kenya, Tanzania, Dominican Republic, Thailand, and Sri Lanka.
- Exchange rate 1,- CHF = 25,603 CZK valid for 2. 11. 2023; 23,924 CZK valid for 5. 5. 2023

Campaigning & Activation

- 9.9. – Prague railway day 2023: ST stand at public event of Czech Railways organized at Vrsovice train station (one of main train stations in Prague) focused on railways experiences. Event visitors had opportunity to gain new tourism information about Switzerland at our stand, consult their plans, buy printed guidebooks, and attend our educational contest focused on RhB and Pilatus-Bahn. STS and RhB additional promotion in form of roll-ups were organized at our stand.
- 28.9. - Late Summer experience at lui.cz: Digital advertorial with RF GTToS YouTube video placed at lifestyle LGBT+ website Lui.cz with late summer promotion of Davos Klosters, Pilatus, SGV, Rigi, Titlis, Zermatt Bergbahnen, Aletsch Arena, RhB and Bernina Express. Added with banner campaign with 3 banners for Davos Klosters, Lucerne, RhB
- 13.10. – ST B2C Newsletter 10/2023 for October with focus on: Autumn ST central campaign; Million Stars Hotel; GTToS; hike and bike possibilities; Nature Spa; vacation in vineyards; Golden Spot by Gornergrat; Gotthard – Bernina train route; Europe highest Christmas markets at Pilatus; new SWISS flights to Prague; Lake Lucern in TV broadcast Objektiv; new ST railway map; invitation to travel presentation of Rigi & SGV; tip for internet mobile connection in Switzerland
- 23.10. - Rigi and SGV presentation by KPS: Travel presentation of SGV & Rigi (by its representatives) organized with cooperation with Club of Swiss friends to media & tour operator representatives, and club members (33 participants; ST, Rigi, SGV brochure distribution at place)

KAM

- 9.9. - STM 2023: Delegation of 13 Czech and Slovak tour operators representatives at STM 2023 in Geneva with Pre-Convention Tours
- 21. 9. - Sales calls organized for Pilatus Bahnen representative for Czech market, Tobias Thut, with 2 TO's in Prague (Touky Evropou, CK Akord)



- 22.9. - Trade / Media Business lunch: Business lunch with ST and Pilatus-Bahnen AG trade presentations by Simon Bosshart and Tobias Thut to invited VIP trade and media partners in CZ followed with lunch (14 participants)

KMM

- 14.9. - SWISSmag Winter 2023/2024: new edition of print magazine SWISSmag with main theme of Autumn and Winter season (3.000 print copies)

- 14.9. - CZ participation at Mini-Intl. Media trip Music, Art & Culture (14. - 19.9.2023), 1 PAX

- 21.9. - ST Press conference WINTER 2023-2024 focused on upcoming Winter 2023/2024 with active participation of EDA, Simon Bosshart, Pilatus-Bahnen AG, and Czech Railways (34 participants)

- 27.9. - 3/1 winter advertorial in luxury high end magazine TOP CLASS with promotion of luxury possibilities of RhB and its Glacier Express with Excellence Class; Bernina Express; and destination St. Moritz with its ski possibilities

- 28.9. - 4/1 winter advertorial placed in premium luxury magazine Luxury Travel Digest with promotion of: ski possibilities (Engadin Scuol, Jungfrau Ski Region, Zermatt Ski Safari, Davos Klosters), unique experiences (Titlis, SGV, Rigi + igloo in Zermatt, Adelboden, Engelberg, Davos), GTToS (GEX Excellence Class, BEX, GoldenPass Express and Luzern-Interlaken Express), spa possibilities (Bogn Engiadina Scuol, Leukerbad, Rigi), Fasnacht in Basel, James Bond Brunch, Zermatt PistenBully Experience, electric scooters at Titlis, Europe highest Christmas market at Pilatus, dog sledge at Glacier3000 and Nendaz zip-line

- 1.10. - CZ participation at Media trip Intl. Geneva & watchmaking history (1. - 6.10.2023), 1 PAX

- 1.10. - Lake Lucerne Region in Travel Life 3/2023: 6/1 advertorial in premium travel magazine Travel Life presenting summer possibilities of Engelberg (Titlis, Alpine Cheese Trail, Alpine huts), Lucerne (Lucern, Verkehrshaus, Kambly)

- 2.10. - CZ Group Podcast Influencer Trip to Aletsch Arena with podcast Hype-Cast (2. - 5.10.2023), 8 PAX

- 12.10. - CZ participation at Intl. Media Trip Savor Swiss Autumn with all Senses, 1 PAX

- 22.10. - Intl. Media trip Swiss Historic Hotels along the GTToS (22. - 27.10.2023), 2 PAX

- 25.10. - Leo Express 10-12/2023 - Winter with RhB: 1/1 advertorial "Winter with RhB" placed in on-board magazine of private railway company Leo Express with presentation of RhB railway experiences with focus on GEX, BEX, CD Ski in Davos Klosters with RhB passengers, Engadin Scuol, and Swiss Travel Pass with RhB

Future Activities

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



2. Active Markets

INDIA

Market Situation

Starting with the figures, namely those of August, we begin to see what are the concrete signs of the extension of the season (already mentioned several times in previous updates).

In terms of arrivals, the drop compared to the same month of 2019 is 31.5 percent while that for overnight stays is 27.8 percent. Better figures than in previous months that bring the trend from January 1 to the end of August to -32.2% for arrivals and -30.5% for overnight stays.

Even though the main vacation season for Indians has now ended with these figures, there are clear signs that give hope for continued improvement by the end of the year. Certainly groups have suffered the most in a number of ways: while very last-minute requests for visas did not allow these groups to obtain them in time (especially in May and June, where visa requests had reached record numbers-partly because there was little support from other Schengen countries), the availability of hotels in destinations such as Interlaken and Lucerne also did not facilitate the recovery process.

Regarding the MICE sector, the recovery is more than good at the level of numbers of realized and confirmed groups. However, it is found that the size of the groups is significantly smaller. One reason may still be the visa situation, which, by reducing the group size, makes it more likely that visas will be obtained. But also the rising costs of hotels and even flights.

The numbers of visas issued in these first 9 months exceeded those of 2019 by about 8 percent (the goal was to reach the same figure, a goal therefore fully met and exceeded). Swiss Travel System also significantly exceeded the already record-breaking 2019 figures, confirming the presence of Indians in Switzerland. Certainly the "apartments" component (not included in our figures) play an important role.

Still presents many unknowns, on the other hand, is the increase of the TCS fee from 6 to 20 percent for foreign travel. It is still unclear what the impact on our figures might be- There is also to be said that the most important TOs but also clients are being "creative" in trying to avoid the tax: by increasing cash payments, or by collecting payments for packages sold through foreign branches). Here of course it is difficult or almost impossible to understand the various maneuvers, because they are not clearly communicated given the sensitivity of the issue. Situation to be monitored to understand the concrete effects.

Campaigning & Activation

KAM Leisure:

- Ad in prominent trade publication TravTalk published in the Oct 1st half edition. Promoting the Lucerne Webinar and the SWISS-BLS-Swissminiatur/FoxTown Webinar. Total Circulation = 108600

B2C

- Neeraj Chopra Digital Campaign

Following the wrap up of our photo shoot with Zurich Tourism and Switzerland Tourism's Friendship Ambassador, Neeraj Chopra, we actively continued sharing his Zurich experiences across social media. This included Instagram collaborations, Stories, and Reels to captivate our audience.



Total Impressions: **14'687'976**

- NC + RF STS

The digital display campaign for STS featuring Neeraj Chopra & Roger Federer was executed on mediums like news app, entertainment apps, OTT apps etc.

Impressions: **44'603'956**

Clicks: **3'357'862**

Visits: **105'112**

- GTToS x RF Magazine Advertisements

We placed single-page advertisements in widely read publications such as Travel + Leisure, Conde Nast, and Vogue. These magazines are some of the most widely circulated in India, allowing us to reach large yet niche audience.

Total Circulation: **446'000**

Total contacts: **2.2M**

KAM

KAM Leisure:

- 5th Sept 2023: ST India destination training in Jalandhar. Presentations by ST, Rail Europe, STS and SWISS. Update on the latest touristic offerings and information for the market. Total No. of attendees = 50

- 9th - 16th Sept 2023: 15 leisure buyers were invited to participate at STM in Geneva (11th - 14th Sept). The event started with pre-tours 9th - 11th Sept and was followed by a special post-tour event organised by Jungfrau Railways 14th - 16th Sept.

- 5th Oct 2023: Exclusive 45 min webinar on Lucerne for the Indian Travel Trade. Presentations were made by Lucerne Tourism, Pilatus and Lake Lucerne Navigation Company. Total No. of attendees = 423

- 12th Oct 2023: 45 min webinar highlighting SWISS, BLS Interlaken, Swissminiatur & FoxTown. Each partner had a 15 min shared slot. Presentations made by ST (on behalf of SWISS), BLS Interlaken and Lake Lugano Group (for FoxTown & Swissminiatur). Total No. of attendees = 420

- 31st Oct 2023: Destination training for the travel trade in Coimbatore, Tamil Nadu. Featured presentations by ST, STS, Rail Europe, SWISS, MGP, Titlis Cableway, RhB and Zurich Tourism. Total No. of attendees = 30

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 participated at STM

- Sales call to corporate clients in Delhi & Pune - October 2023



KMM

- ST hosted a celebratory dinner in honour of Friendship ambassador Neeraj Chopra's World Championship victory in Budapest and a silver medal in Weltklasse, Zurich. .ST India disseminated a press release to spotlight the felicitation dinner and another one about his day spent exploring Zurich.

- Our collaboration with Zurich Tourism for the Neeraj Chopra campaign, focused on highlighting the exceptional experiences he had in Zurich. This led to media coverage in prominent Indian publications, including mainstream, lifestyle, sports, and regional categories.

Total contacts: **518'470'121**

- We collaborated with GTToS team for a film shoot, featuring well-known Indian TV stars Neil Bhatt and Aishwarya Sharma. They joined us on a trip to Switzerland to create content for amplification and promotion. To create excitement and gain media coverage for the trip, we used gossip notes and press releases.

Total Contacts: **214'177'315**

- Global SPA cover shoot - We partnered with Global SPA, India's premier wellness and lifestyle magazine, for two cover shoots. These covers featured the renowned Bollywood actress, Tamannah Bhatia, and the winner of MasterChef India, Shipra Khanna. We also distributed several press releases to secure extensive media coverage.

Total Contacts: **227'255'100**

Future Activities

Campaigning & Activation:

KMM

KAM Leisure:

- Destination training in Bhubaneswar (1st Nov 2023) and Rajkot (7th Nov 2023)
- STE 2023 27th Nov 2023 - 1st Dec 2023 - Roadshows in Mumbai (27th Nov) and Delhi (1st Dec).
- VIP Networking Event between Suppliers and Key buyers (28th - 30th Nov).

SCIB:

- Attendance at IBTM
- Corporate Study trip from 6th to 11th December, total 12 pax
- Sales call in Chennai & Kerala
- Networking with corporate clients.

B2C:

- In December 2023, we're planning an influencer FAM trip in partnership with Lucerne Tourism. This trip will involve well-known Indian influencers and content creators who cover diverse topics like food, adventure, and general lifestyle.
- We will be selecting a freelance travel journalist to participate in the international media trip titled 'Winter Magic and Advent Markets' in December 2023.
- We're also set to run advertorials in top magazines, showcasing the winter experience in Lucerne.



2. Active Markets

JAPAN

Market Situation

Outbound tourism is continuing to recover slowly with Switzerland still being the strongest selling destination in Europe. Exchange rate and flight capacities remain a challenge.

Campaigning & Activation

- Quinn Campaign x '25ans' magazine Swiss Luxury Talk Show event on 18 October by inviting 70 guests including 15 influencers.
- Quinn Campaign, '25ans.jp' article SoMe Ad and boosting.
- Instagram and X (Twitter) boosting of Jungfrau Railways/Interlaken/Jungfrau Region, Schilthorn and Basel.
- Display advertising and social media campaign for Basel targeting millennial art enthusiasts.
- Millennial 'Kawaii campaign': Social Media campaign that gets people to vote for the most Kawaii (cute in Japanese) picture taken in Switzerland.
- 4/5 October: Green Challenge Tokyo. Sustainability fair at which ST and SWISS had a stand together to introduce Swisustainable.

KAM

- Swisustainable product training with travel Agent Hankyu.
- 9.9.2023: Japan pre-STM fam trip to Zurich with 5 Agents.

KMM

Media Trip

- JCB The Premium media trip in Jungfrau Region, Zermatt, St. Moritz, featuring GTToS of Glacier Express and Bernina Express.
- Int'l media trip Swissness and Swiss History, participated by JJI press.
- Mammot Mountain Day media trip in Zermatt including a day trip to Jungfrau Region and Schilthorn.
- Asahi Shimbun '&Travel' media trip exclusively in Zurich.
- Asahi TV 'Tabi Salad' filming in Zurich, St. Moritz, Bernina Express, Glacier Express, Zermatt, Jungfrauoch, Interlaken, Brienz, Schinyge Platte, Mürren.



- Int'l media tripo 'Savor Swiss Autumn' participated by Newsweek Japan.

Media Result

TV:

- BS Fuji TV 'World Tour' featuting exclusively Jungfrau Region.
- Asahi TV 'Tabi Salad' Swiss Special vol.1 featuring Zurich.
- Asahi TV 'Tabi Salad' Swiss Special vol.2 featuring Mürren and Schynige Platte.

Magazine:

- 'Mono' magazine to feture Mammut Mountain Days in Zermatt.

Online:

- '25ans.jp' 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.
- Asahi Shimbun '&Travel' featuring exclusively Zurich.



2. Active Markets

KOREA

Market Situation

[Economy]

According to the "Consumer Price Trends for October 2023" released by the Statistics Korea on November 2, the consumer price inflation rate for last month was 3.8%. This was 0.1 percentage points higher than the previous month's increase of 3.7%. This is the highest increase rate in 7 months since February (4.2%). The inflation rate peaked at 6.3% in July 2022, then fell to 2.3% in July 2023, and has been increasing for three consecutive months.

The main reason for the increase in the inflation rate is the sharp rise in agricultural product prices. The agricultural product price inflation rate for last month was 13.5%. Another factor that contributed to the increase in the inflation rate was the narrowing of the year-on-year decline in petroleum product prices. The price of petroleum products fell 4.9% in September compared to the same month of the previous year, and fell by 1.3% in October. This is because the international oil price, which has been rising since August, is being reflected in the domestic selling prices of gasoline and diesel with a lag.

[Tourism]

The destination with the highest level of satisfaction among Korean travelers this year was Switzerland, followed by Spain. (Survey by Consumer Insight, Aug. 2023)

Since last July, the number of overseas travelers has exceeded 2 million per month. According to recent overseas travel statistics, the number of outbound travelers in September was 2.02 million, showing a 98% recovery compared to 2019, giving a positive signal. However, with the winter season start, there is a sharp decline in reservations and major KAs are planning for 2024 Summer season with various themed products.

Campaigning & Activation

Basel Night

- Date: 12 Oct 2023
- Venue: Swiss Hanok (Swiss Embassy)
- Program:

Welcome speech by Swiss Ambassador

Welcome speech by Head of City Development

2 Group Interviews

Part 1 / Art - by Director of Art Basel Hong Kong and Director Basel Academy of Art and Design

Part 2 / Architect - by Artistic Director of the Basel Architecture Week 2022, head of urban planning and architecture of the canton of Basel-Stadt, and Head of City development of Canton of Basel-Stadt

Closing Speech by ST (Simon Bosshart)



- 120 guests were invited including media in the travel, architecture, design, art and culture sectors, trade VIPs as well as officials.
- To increase the visibility of the city of Basel as an attractive location to all kinds of interests, including tourism, art, architecture and urban development.

KAM

STA Study Trip

- Period: Sep. 7-16, 2023
- Partially combined with STM Geneva
- Destinations: LLR, Interlaken, Jungfrau Region, Jungfrauoch, Valais, Zermatt, Zurich, BEX
- Participants: 17 pax (HanaTour, ModeTour, TravelEasy, NaeilTour, etc.)
- 2024 summer product preparations

Hiking suggestions

Introduction of hotels, panorama trains, museums for FITs and groups

Luncheon with major KAs for Basel Tourism

- Date: 10th Oct. 2023
- Participants: Ambassador, Christoph and 12 team leaders from major KAs, 16 pax
- Venue: Swiss Embassy Residence
- Program:

11:30 Welcome aperitif in the residence

11:45 Presentation by Basel

12:00 Luncheon

Sales Calls for Basel Tourism

- Date: 11th Oct. 2023
- KAs: KalTour / G2Travel / HanaTour/ WAUG
- Pitching for themed products with Art and Architecture

KMM

Media Newsletters to 700 journalists in Sep & Oct respectively

* Major Results:



- Seoul News: Christmas is coming, Switzerland Tourism reveals Christmas market schedules. (Oct 31)
- Open News Media: Basel Night concludes, promoting Swiss Architecture and Art (Oct 16)

Future Activities

Sales Calls Korea

- Period: 14-15 Nov. 2023
- Location: Jeju Island
- Participants: 12 suppliers and 14 buyers

SoMe Winter Event (Instagram) - TBC

- Period: Dec 2023
- an interactive event to increase Engagement Rate and promote winter destination of Switzerland



2. Active Markets

NORDICS

Market Situation

Weak currencies (FI and DK a bit less than NO and SE) and a still relatively high inflation rate makes life and travelling abroad more expensive.

GDP in Sweden was slightly minus for two quarters but should turn to the better as from 2024 on. FI and No slightly better, Danmark clearly better with Novo Nordisk as the main contributor to the upswing.

Best practice competitors

Visit Sweden launched a video about the Sweden/Switzerland confusion. According to their information this resulted in most worldwide reactions / best ever campaign results in history of Visit Sweden campaigns. Within Sweden the video was seen as fun and entertaining.

Campaigning & Activation

SNO Event Oslo 26-29OCT

4 days activation at SNØ Snow hall, every day another sport: Ski CrossCountry, Freestyle, Sledging. Competitions. Prizes by Engadin.

1 MICE/Trade Event: 22 participants

Contacts Skihall activities: 1000 visitors. Partner: Engadin St. Moritz

FriFlyt Filmtour OCT 4-28

4OCT, launch event with around 750 guests (totally sold out) and SkiTOs in Oslo. 21 Events showing Indie Freeride Movies and Davos spots on big screens. Total: 6300 Visitors. Exclusive Partner: Davos.

KAM

-STM - 11-14/9

8 participants from the Nordics

- Explore our Home Markets 19/9

LH Group Event in cooperation with their home markets.

ST teams up with Davos. Presentation of each "home country" 80 pax

- SMAL Event - Finland 19/9



B2B Workshop organised by the the Association of Finnish Travel Industry.

ST teams up with Valais

171 pax participated

- Air Tours, Education Evening - Stockholm 19/10

Information evening for Air Tours employees to educate them on the new destinations they have in Switzerland.

11 pax participated

- SCIB Networking Event and Raclette Dinner. 19/10. 35participants.

Partner: Lucerne, Engelberg, Davos

KMM

FI - Helsinki - Valais Media Breakfast 19/9 10 participants

Various Media Trips:

SE - Eyal Sharon Krafft Valais + Gruyere- 1/9 - 12/9

SE - Lottie Knutson - Valais 3/9 - 8/9

SE - Fanny Josefine - Engelberg (Cirque series) 21-24/9

SE - Sandra Beijer - Basel 21-24/9S

SE/NO - Ebba Forsgren/elisabethmathisen/Frauke - 10-14/10

DK - Peter Christiansen Swiss Historic Hotels along the GTTOS 22- 27/10

NO - Arild Molstad - Postbus 21 -24/10

SE - Matilda Söderlund - Ticino 20/10-5/11

Future Activities

-STHLM Days 23-24NOV. Winter launch.50 trade, media and content producer as well as 10 Swiss partner will be attending.

-Recovery Campaign: Stay Longer - Delve Deeper with digitale natives in dif

Interesting observations

SAS to move away from Star Alliance / LH Group towards Air France KLM.

Scandinavian airline SAS announced 4 October that U.S. investment firm Castlake and Air France-KLM would become new major shareholders in the airline alongside the Danish state following bankruptcy proceedings.

Castlake will take a stake of about 32%, Air France-KLM's will be around 20% and the Danish state

Switzerland Tourism.



will hold about 26%, SAS said.

(JJ)

Private train company Snälltåget offers nighttrains once a week from Malmö/Copenhagen directly to Zell am See in Austria. We are in contact with



2. Active Markets

POLAND

Market Situation

Politics

The Parliamentary elections in Mid-October brought a sweeping change to the political landscape in Poland. The ruling PiS party led by Jarosław Kaczyński and with their current Prime Minister Mateusz Morawiecki came out as the strongest party, but failed to secure an outright majority in the Lower House of the Polish Parliament, the Sejm. Even with a potential coalition partner, the far right “Confederation”, they clearly fall short of the threshold of 230 seats. A coalition of three center-left alliances, however, led by former EU council President and former Polish Prime Minister Donald Tusk, secured a comfortable majority with altogether 248 seats. President Andrzej Duda, who was a PiS politician himself before becoming head of state, designated Morawiecki to build a new government. It is, however, widely expected, that he won’t be able to build a governing coalition and that Tusk will be designated next. Tusk has already been working on a coalition agreement with the other parties of the democratic opposition, which also has a clear majority in the Upper House of the Parliament, the Senate. The opposition victory was fueled by an unprecedented turnout of voters, that reached over 74%, a record in Polish history since 1989.

Economy

Inflation in October fell to 6,5% year on year, after 8,2% in September. Average wages in the private sector grew by 10,3% year on year in September, lifting the number to almost 7400 Zł. (1600 CHF).

The GDP, after falling for the two first quarters of the year, picked up some speed in the third quarter. Estimates are hovering around +0,5% for the months of July-September and also for the whole year. Next year, the GDP could grow by around 3%.

Poland experiences a lack of qualified employees, despite the fact, that ca. 1 million Ukrainians and Belarussians are officially registered with Social Security to legally work in the country. More and more immigrants from Asian countries like India and the Philippines are entering the market.

Campaigning & Activation

- 100% women biking trip with *Wysokie Obcasy*.

21. - 24.08 gravel biking trip with Olympic MTB silver medalist Maja Włoszczowska, 2 influencer., 1 photographer, 1 journalist. Lakes Route no. 9, Cooperation with Eurotrek, Journalist from women’s magazine *Wysokie Obcasy*, SoMe of participants, YouTube. Organic SoMe reach 920’000, Articles after return

- Branding weekend *Wyborcza.pl*

Two weekends in September

2. - 3.09 and 16. - 17.09

Branding on *wyborcza.pl*

Focus on trains and train rides and Grand Tour of Switzerland



Display and desktop creations

Reach 5'970'000

- Articles on *newsweek.pl*

Online articles from printed *Newsweek Travelling* supplement

4 stories with focus on RhB (Bernina Express, historic train in Davos)

Articles reach 210'000

- ST FB activities

Sponsored post promoting our eGuide GToS

September

Reach around 660'000, engagement over 2'000

FB posts for our partners

Pilatus and Aletsch Arena

Ongoing, final results in November

Autumn and senses

Our Youtube movie with focus on autumn, sponsored post with autumn inspirations

Link to MySwitzerland / autumn

Reach 340'000

ST Facebook stories

Autumn inspirations, senses, autumn activities

Avg. weekly reach around 9'000

- Branding *wyborcza.pl*

One weekend and also daily presence

30.09 - 1.10 and 4.10

Branding on *wyborcza.pl*

Focus on cities and autumn

Display and desktop creations

Reach 6'100'000, 13'200 clicks

- eGuide GToS promotion

Display on *wyborcza.pl*

Creations promoting downloads of our eGuide



One month presence

Reach: 4'690'000

8'000 clicks

- Ad in magazine *Ksiazki*

Bi-monthly magazine *Ksiazki*

October edition

One page ad with autumn inspiration

QR code linking to our autumn MyS landing page

Copies: 16'000

Reach 57'000

- Video materials on wyborcza.pl

Video articles after September trip with *Gazeta Wyborcza* and contest winners

3 videos planned, 2 published so far

Online, SoMe promotion

Focus: Aletsch Arena, RhB

Video views so far 250'000

SoMe reach so far 65'000

- GToS campaign with natemat.pl

Activities with *natemat.pl*

Focus Grand Tour of Switzerland (also eVersion)

Content created during media trip in September and display creations

Article, display, SoMe activities, atavist

Total reach 1'850'000

KAM

- STM in Geneva

09. - 14.09

18 participants from Poland

3 x MICE, others - FIT and groups summer and winter focus

Pre-convention followed by destination day and workshop



Exchange and inspiration

Posts in SoMe of participants

- Fam trip with RhB

14. - 16.09

Post Convention Tour after STM

7 pax by Bernina Express, breakfast carriage, open carriage

Experience and inspiration trip for Tour Operators

KMM

- *Madame Edith and friends* influencer trip.

3. - 7.09, 5 female influencers

Grand Train Tour of Switzerland

SoMe of participants, blog posts planned

Promotion of our GTToS eGuide

Partners integrated: RhB, Ticino, St. Gallen, Lucerne

Reach so far 320'000

- TV team, Dzień dobry TVN trip.

5. - 9.09

Morning show on TVN - Poland's biggest private TV channel

Focus on GTToS

Golden Pass (Express, Belle Epoque), Lucerne, Montreux

3 episodes followed by article online to be published at end of September / October, figures to follow

- TV personality trip by Aleksandra and Marta

29.08 - 7.09

Aleksandra Kwaśniewska, daughter of the former president, and her actress friend Marta Wierzbicka (630'000 follow. total)

Grand Train Tour, panoramic rides, eGuide GTToS promoted

Instagram posts, reels & stories

Articles by other media informing about their trip

- Media trip by Natemat.pl



11.-15.09

Journalist and photographer of portal *natemat.pl*

eGToS by Europcar

Content for online article, SoMe

Promotion of the route and our eGuide GToS

- Camper trip by *Busemprzezswiat.pl*

5. - 21.09

Family camper trip to Switzerland

Grand Tour of Switzerland

SoMe during and after return

Video on YouTube planned Promotion of GToS eGuide

Reach so far 270'000

- Contest winner trip *Wysokie Obcasy*

14. - 18.09

4 winners and journalist's team in Switzerland

Grand Train Tour of Switzerland

RhB, Davos Klosters, Aletsch Arena

SoMe of participants, content for movie, articles and SoMe

Reach so far 329'000

- Mini Int. Trip Music Arta & Culture

14.-19.09

Journalist from one of the biggest women's magazines in Poland

KKL anniversary as main focus

Article planned within few months

- Trail running trip to Engelberg

21. - 24.09

2 runners, 1 influencer taking part in the trail run, plus a photographer

Accompanied by camper trip of two more runners

Project *#fromPUTtoEngelberg*

SoMe during and after return by participants and trail running profile



- Mini int. Trip by wyborcza.biz

Geneva and watchmaking history

1. - 6.10.

1 pax from Poland

Journalist from business newspaper and online portal

Activities during the trip and article after return

SoMe on spot and after return, reach 125'000

3 Newsletters, 579'000 subscribers

- Photographers trip Autumn

8. – 14.10

6 photographers

Focus on autumn season, hiking

#jesiennebarwyszwejcarii

Appenzell, Bernese Oberland, Central Switzerland

Activities in SoMe, stories, posts during the trip and after return

Sponsored posts – ongoing also in November

Reach so far: 340'000

- Mini int. trip Gazeta Wyborcza

Swiss Historic Hotels along GTToS

22. – 27.10

1 pax from Poland

SoMe on spot, content for article after return will be published on *Wysokie Obcasy*, women magazine and online

Future Activities

Winter meeting with trade and media, November

Display campaign winter, November

ST wall calendar, November

Embassy fence exhibition, topic winter, November - March

Fam trip winter in Engelberg, 5 pax, December



2. Active Markets

SOUTH EAST ASIA

Market Situation

Comparing now to Sep/Oct 2022, the growth shows relatively stable with, in September 2023 a 5% increase in overnights. The final quarter, which typically represents 30% of the yearly overnights, is foreseen to follow this trend and achieve a slightly higher result than Q4 2022.

Taken individually, the markets show the following performance from Jan-Sep:

- Thailand: 174K overnights, +2% growths compared to 2019.
- Singapore: 164K ON, +42%
- Malaysia: 100K ON, +68%
- Indonesia: 82K ON, +13%
- Philippines: 54K ON, +60%

Based on the update results, we have adjusted our forecast to +29% growth this year, compared to 2022, and +6% in 2024.

Best practice competitors

NTOs, including TW, PH, are actively promoting to Muslim travellers from ID and MY markets.

Campaigning & Activation

STS - Push Excellence Program sign-ups with database of >500 users whose Expert certifications have lapsed.

STS - Klook Travel Fair sponsorship 14-15 Oct

STS - GTToS advertorials in TTG Asia Sep and Daily Show (digital) Oct

STS - Advertorials on Singpromos.com 1-31 Oct

STS - Advertorials on Chinapress.com.my 1-31 Oct

MY - Lifestyle campaign presentation with Andermatt Swiss Alps

SG - Lifestyle campaign presentation with Andermatt Swiss Alps

C&A - Thai KOL Kratip trip, gastronomy theme, 29 Sep – 08 Oct 2023

SEA - RF spot distribution on Viu

SG - Offline activation at Ultraluxe



MY - Activation with Kids Art School Muz'Art, to last until Spring.

KAM

STS - roll banner distribution by Pinatlas to Bangkok trade

STS - Autumn Newsletter to Trade 1Sep

STS - 2024 Rates Newsletter to Trade 1Oct

STS - B2B Seminar with Swiss Fanclub TH 10Oct

STS - Sales visit in Jakarta with Rail Europe 16-18Oct

STS - Trade Seminar in Manila 23Oct

STS - Excellence Talk with ASTA Philippines Chapter 25Oct

STS - Attend Grab presentation 28Sep

STS - Attend EU Holidays Grand Opening 7Oct

STS - Attend MGB Glacier Express VIP Dinner 30Oct

SEA - participation in STM 2023 with 37 buyers

SEA - Trade webinar lifestyles, 16 Aug & 27 Sep, total 530 attendees/QIs, 2 newsletters

SEA - Fam trip collaborated with Heavens portfolio, luxury segment

TH - KA networking event in Bangkok, 27 SEP, 45 participants

TH - Marketing plans with Quality Express, 7 new products development, 1.6K overnight generation (APR-OCT2023)

MY - Lifestyle B2B presentation, 13 September

KMM

STS - MOU Signing media event with Traveloka+KKday+ST+STS

TH - lifestyle media conference in Bangkok, 27 SEP, with Press release, 25 participants

TH - articles on AnywhereMagazine, I will travel around the world, Bangkok Post.

PH/MY: Content Distribution with L'Officiel

TH: Content Distribution with Hello!

MY: Participation to Int'l Media Trip "Savor Swiss Autumn".

SEA: Lifestyle Media Trip with Heavens Portfolio (6 media, TH, ID, MY, SG)



Future Activities

STS - Seminar with Kuoni Tumlare Singapore 1 Nov
STS - Market Development Tour MNL KUL JKT SUB 16-24 Nov
STS - CEO visit 6-8 Dec
STS - KOL 2.0 Winter Trip 8-15 Dec
STS - KKDay Winter campaign Nov - Dec
SEA KAM: Market development tour, 16-24Nov
SEA KAM: 2 Snow webinars, 8 Nov & 6 Dec
SEA KAM: FAM trip collab with the Leading Hotels of the World, 8-18 Nov
SCIB TH: KA gathering and visits, 9-10 Nov
TH KAM: Networking event & visit, 3-5 Dec
C&A: TH OOH: Swisstainable Bangkok Skytrain, 01 DEC 2023 – 29 FEB 2024

Interesting observations

STS - JR Group begin to focus on promoting regional passes from 1Oct 2023. This follows the increase of up to 77% for their nationwide passes.
Vietnam Tourism Association (VITA) and KNTO signed an MOU on 28Sep to bolster tourism cooperation, including tourism fairs, seminars, fam tours.
Bali Tourism Board will impose IDR150k tourist tax from 14Feb2024, to raise funds to tackle waste management, improve traffic conditions and enhance tourism infrastructures.
Singapore Tourism Board launch “Made in Singapore” global campaign to put a fresh spin and inspire travellers to visit the country.
TH - Visa issuance is well managed during the 2nd top high seasons in Thailand, no concerns raised by KAs
TH - CHF highest exchange rate to THB over years affected buying decisions



2. Active Markets

SPAIN

Market Situation

The travel trade sector in Spain is surpassing the pre-pandemic numbers. According to the CEAV (Confederación Española de Agencias de Viajes) Spanish travel agencies and tour operators sales increased by a 15% after the summer period.

Some of our trade key players confirm those numbers, with +3'000 new spanish travellers to CH (Civitatis) or Edreams confirms that Switzerland is on the 12th position among the most searched countries to travel from Spain.

Best practice competitors

Austria Tourism organized their roadshow in Madrid, Bilbao and Barcelona with around 270 participants. https://www.agenttravel.es/noticia-051831_Austria-promueve-las-novedades-de-sus-destinos-en-Espana.html

Campaigning & Activation

- **Winter Magazine** distribution at La Vanguardia (30K units)
- Basel interactive map with **Viajes National Geographic**, 565'000 marketing contacts
- The famous Spanish pastry chef **Jordi Roca** engaged their 700K followers sharing his experience travelling around Switzerland. 1'238'000 marketing contacts
- **Sketching "This is Basel" with Alicia Aradila**. We have produce a **notebook** with her illustrations and sent it out to 50 media contacts as an inspiration to get to know Basel personally. In addition, we have published an online advertorial in the travel magazine "**Viajar**" with the illustrations animating to visit the city as an ideal destination for an autumn getaway or during the Christmas markets.

KAM

- End of campaign with **Europamundo** with a succesful B2B Webinar, in which attended 244 travel agencies and tour operators from Latin America.
- Christmas markets B2B webinar with **Agenttravel** (Travel trade media), r, in which attended 177 travel agencies and tour operators from Spain.

KMM

Mediatrips



Oxigeno Magazine to the “Mammut Mountain Days” in Zermatt, 01.-03.09.2023

Grupo Vocento to Fribourg Region, 18.-24.09.2023

Radio Marca “Paralelo 20” program to Intl.Geneva and watchmaking history to Geneva, Biel and La Chaux de Fonds, 01.-06.10.2023

Radio Libertad “Piérdete y Disfruta” program to Lucerne, 04.-08.10.2023

Group Mediatrip with ABC, 20 Minutos, Cronica Global, Libertad Digital and Freelance Manena Munar to Zurich, 05.-07.10.2023

Top Coverage

Abc.es: “La esfera de reloj más grande de Europa está en esta iglesia”, 1’292’233 media contacts

Elpais.com:”Qué hacer 24 horas en Berna, una capital atípica”, 1’919’250 online contacts

“Madrileños por el Mundo”, TV Programm about Bern & Region, 300’000 viewers

Traveler.es:”Grindelwald, el pueblo más bonito de Suiza: un viaje de cuento”, 400’000 online contacts

Traveler.es: “Gruyères, el pueblo con el mejor queso del mundo”, 400’000 online contacts

Traveler.es: “Ginebra, una escapada a la ciudad suiza que mira al lago”, 400’000 online contacts

Bikebeer.es: “How to la nueva guía online Suiza para disfrutar del invierno helvético esta temporada”, 50’000 online contacts

Radio Marca: “Visitamos la ONU con Joaquín”, 350’000 listeners

ABC Newspaper: “Hay vida en Zúrich más allá de su cliché”, 1’544’159 print and online contacts

20Minutos.es : “Siete planes sorprendentes para conocer otro Zúrich”, 2’079’013 print and online contacts

Elpais.com : “La montaña mágica de Thomas Mann está en Davos”, 1’919’250 online contacts

Miradas Viajeras Movistar TV: “Refugio de diseño”, 196’577 copies, 377’510 contacts

Radio Libertad: Interview with Lucerne Tourisme, 80’000 listeners

Media Contacts: 11’111’415

Interesting observations

Swiss Travel Pass sales are still booming one more year, with a turnover all STP products of +34% in Spain and +114% in Portugal compared to last year.