



Market Updates

November/December 2023

Editorial

Dear Partners,

The year 2023 will not only be remembered in the history of the Swiss tourism industry as an extraordinary strong one, it's as well the year, in which finally all global markets have left one of the biggest industry crises behind, some even substantially stronger than before. Together with you, we look back into a very exciting year, in which we have been able to realize over 3'600 marketing activities worldwide, including 60 media conferences and 106 fam trips, just to mention some fields of activation.

With the end of 2023, we are as well going to close another chapter, as this will be the last edition of our bimonthly "Market Update" in Newsletter form. We are currently working on a new form of feeding you with updates on our markets and our activations. Stay tuned and expect further news not later than the time, when you should be expecting the first 2024 edition of this market update ...

Best personal regards,

Simon Bosshart
Head Markets East



1. Priority Markets

BENELUX

Market Situation

In 2023, the Dutch economy experienced a slowdown but remained resilient and the forecasts for 2024 look better again. Growth of 1.1% is expected in 2024 and 1.7% in 2025. Inflation fell to 4.6% in 2023 and is expected to fall further to an estimated 3.7% in 2024. Growth is set to benefit from increased public consumption and investment. A still strong labour market supports the domestic demand. Unemployment rate remains low at 3.9%.

Economic growth in Belgium is expected to remain broadly stable over 2024 with an increase of 1.4% in 2024 and 1.5% in 2025. In view of the evolution of energy prices and the mitigating effect of government measures, inflation is projected to reach 4.2% in 2024, before declining to 1.9% in 2025. Private consumption is set to remain robust over the forecast horizon, as purchasing power of households is supported by the automatic indexation of wages and social benefits.

Growth forecasts in Luxembourg is set at 1.4% for 2024. Employment and wage growth and high purchasing power will remain robust.

Campaigning & Activation

Meetings:

Belgium

- Boardroom Magazine: 2 pages about Zurich: Zurich, A Truly 'Swisstainable' Conference Destination. 7'500 ex.

-eNews (November) sent by Associationplanner.eu to 1'900 contacts. Small introduction and link to online article about Zurich For XL meetings with charm.

-eNews (November) sent by Corporateplanner.be to 4'000 contacts. Small introduction and link to online articles about Zurich: Métropole cosmopolite au bord de l'eau ; Zürich – kosmopolitische metropool aan het water and second article about Geneva: Découvrez la parfaite fusion de la science et de l'élégance à Genève au CERN. Ontdek de perfecte fusie van wetenschap en elegantie in het CERN

-SCIB enews (December) to 1515 contacts: Switzerland, always stylish and innovative.

-Rendevenement Magazine: 2 pages advertorial: 4 raisons qui font de la Suisse l'endroit idéal pour vos événements durables. 4 redenen waarom Zwitserland dé perfecte duurzame eventlocatie is. 5'000 ex. 11'050 contacts.

Cities Marketing

Netherlands & Belgium:

- Exclusive project with Dutch artist Malou Cohen and Basel Tourism at the Affordable Art Fair in Amsterdam. 1.11-5.11: fair presence, excl. press event, online presence

Winter Marketing



Netherlands & Belgium:

- ACSI Winter camping: exclusive campaign with MiB (print & online)

Netherlands:

- 3 influencer trips to Christmas markets in Switzerland (Bern, Baden, Geneva, Montreux, Winterthur & Einsiedeln) with collaboration posts on Instagram.

KAM

Meetings:

Belgium:

- BCD supplier Event Zurich: Serotonin and post tour Geneva: total 42 contacts
- Raclette/Fondue Dinner with meeting Trophy participants: 7 participants
- IBTM Barcelona: 35 pre-scheduled appointments: Total of 40 contacts
- BBT Speed date workshop: 120 participants. 3 Swiss partners: Davos, Lucerne and Pilatus Bahnen. Total of 40 contacts

KMM

- Press trip in collab with Interrail to Interlaken & Lausanne, 6 participating journalists
- Press trip to Bern Region to promote autumn and its senses, 6 participating journalists
- TV-broadcast Denkend aan Zwitserland, 4 episodes with 2.5 million viewers per episode. Topic: GTToS in Winter.
- Press trip to Christmas Markets in Zürich, Lausanne and Luzern, 6 participating journalists
- Press trip top Samnaun to promote skiing, 4 participating journalists

Future Activities

Meetings:

Belgium

30.01.2024: Geneva Association event at the Swiss Residence



1. Priority Markets

FRANCE

Market Situation

In the last two months of the year, the business climate as well as the employment climate have darkened again. In terms of tourism in France, the year has been very positive. According to MKG figures, revenue per room (RevPar) rose by 1.7% compared to the summer of 2022. A comparison with the pre-crisis period shows the extent of this performance, with an increase of 21.9% over 2019.

Campaigning & Activation

SCIB:

- 11 articles publiés sur le blog. 11'175 visites sur le blog au total.
- Webinaire "Genève innove pour votre événement durable." 21 personnes ont participé en direct, 20 no show et 46 autres personnes pas dispo, mais intéressées par la thématique.
- Diffusion de l'e-news 06 "La Suisse à portée de TGV pour vos événements cet hiver" à 2242 contacts. Ouverture unique : 606 / taux d'ouverture : 27,29%
- Campagne Outbrain file rouge avec diffusion différents contenus (destinations, témoignages, thématiques ...) de MyS Meetings. 34 270 clics et un CTR moyen de 0,60 %
- Campagne sur decision-achat.fr : 2è volet avec un dispositif "Génération de Leads" grâce à un document (livre blanc, doc thématique, présentation) dont ils font la promotion. Nous choisissons de diffuser notre brochures "50 nouveaux bons plans pour un événement inspirés...en Suisse". Landing page dédié avec formulaire qui nous génère les 50 contacts corpo promis. Qualification en cours
- Campagne LinkedIn avec Gammed.

Des Text Ads et Carousel Ads pour parler de notre blog (témoignages et nouveautés) d'une part et de la page dédié aux événements durables sur MyS d'autre part. 1'138 683 impressions et 9220 clics ont été générés ce qui fait un taux d'interaction de 0,81% et un CPC de 1,64€.

GRAND TOUR OF SWITZERLAND

-Campagne mettant en avant le Grand Tour OF Switzerland avec le média Le Routard. Une double page a été publiée dans le magazine et un espace dédié digital a été créé mettant en avant l'itinéraire.

Lien : https://www.routard.com/pages_spe/suisse/grandtourdesuisse.html

KPIs : 47K visits garanties

HIVER

- Guide des stations, skieur magazine : cahier 10 pages sur le Valais dans le Guide des Stations de Skieur magazine. 41k exemplaires
- Guide des destinations, skieur magazine : cahier 8 pages sur le Valais dans le Guide des destination de skieur magazine. 41K exemplaires



- Magazine Hiver White : diffusé avec le Guide des stations de l'Equipe sur la région IDF et RA. 70k exemplaires diffusés.
- Skipass.com : mise en ligne de 6 articles "How To Winter" sur le site skipass.com. Recrutement de 2 personnes qui partiront à Verbier en janvier 24 avec les équipe de Skipass. Social media + article éditorial
- Skiinfo : mise en ligne d'un dossier Valais sur le site skiInfo.
- Le Point : double page publiédactionnel sur l'Oberland bernois en hiver. Novembre 23. 300k exemplaires - 1.7M de lecteurs.
- lepoint.fr : mise en ligne du publiereportage print sur l'Oberland bernois. Sponsorisation du dossier hiver.
- Campagne trafic (performance) sur outbrain pour mettre en avant le Valais. 20k clics garantis.

KAM

SCIB:

- Afterwork de Noël avec Curling & Fondue : 53 participants. Ces derniers ont particulièrement apprécié le format convivial et authentique.

La présence de Crans Montana était intéressante pour accentuer les destinations montagnes, beaucoup de gens nous ont posé des questions sur la desti suite à sa présentation.

- Eductour Zurich : Découverte destination accessible directement en TGV + Circle. Initialement prévu en septembre, le voyage a pu finalement se tenir mi-novembre. 10 agences, bluffées par le Circle qui ne fait pas du tout hôtel d'aéroport et le musée Lindt.

- IBTM : Très bonne édition, 14 nouveaux contacts et 39 Rdv qualifiés.

Loisirs:

- Afterwork de networking sur la terrasses de ST, Ambiance chalet et raclette. Evènement organisé en collaboration avec l'Autriche. 19 participants (TO, agents de voyages)

KMM

Media Event

Novembre/décembre riche en retombées médiatiques du aux voyages de presses des semaines précédentes. Couverture nombreuses dans des Key Medias, avec dès thématiques à l'approche de l'hiver:

Télévision: France 3 national (5 reportages), France 5 (rediffusion Echappées Belles en Prime time), TF1 (JT 13 et 20)

Presse écrites: Le Figaro (quotidien / web et magazine) plusieurs articles, Le Monde (Top destinations 2024)



Future Activities

KAM/KMM/SCIB: Evènement de networking à Paris en collaboration avec Vaud Promotion, Lausanne Tourisme, Montreux-Vevey Tourisme et le Musée Olympique. Lieu dans un centre culturel dédié aux sports urbains dans le cadre des JO de Paris 2024, co-mise en place par le Musée Olympique.

Objectif: lancer l'année Olympique et valorisation de la destination Suisse comme siège du CIO mais comme lieu d'activité, sport, loisirs dans toute sa variété. Annonce de la House of Switzerland.

SCIB : Eductour à Villars-Les Diablerets fin janvier, éductour à Davos-Bâle début février. Salon SBE à Lyon en février.

HIVER :

Voyage skipass : diffusion sur les réseaux sociaux

Petaouchnok : diffusion de 3 vidéos (tournage en janvier)



1. Priority Markets

GCC

Campaigning & Activation

Date: 12 – 28 Nov 2023: 3 In Mall Digital (Riyadh) and 3 OOH Digital Community, Mupi, 3D Billboard (Jeddah) focusing on “I need Switzerland” in English promoting different regions. Generating 8 Mio impressions total for all OOH campaigns. Partners: GRF, CM, GVA, LUC, INT, LUG, ZRH

Weddings SoMe Campaign 1 – 6 November, Instagram video campaign promoting Switzerland as a wedding destination to expat community in GCC focusing on testimonials. Impressions: 2,773,425, Clicks: 136,994, Reach: 1,212,619

Weddings SoMe Campaign: 10 – 18 November, Instagram video campaign promoting Switzerland as a wedding destination to expat community in GCC focusing on wedding hotels. Impressions: 5,283,667, Clicks: 45,828, Reach: 1,772,404

Weddings SoMe Campaign 19 – 23 November, Facebook boosted post promoting wedding hotel in Switzerland to Arabs. Impressions: 1,914,625, Clicks: 8,090, Reach: 960,200, Dolder Grand Hotel Zurich

Weddings SoMe Campaign 24 – 31 November, Facebook boosted post promoting wedding hotel in Switzerland to Arabs. Impressions: 1,054,544, Clicks: 8,611, Reach: 678,064, Beau-Rivage Geneva

Medical Facebook Campaign 29 Nov – 3 Dec, Facebook campaign. Several posts. Various targeting. Impressions: 977,098, Clicks: 5,826, Reach: 479,951, Partner: Hirslanden Clinic

STS Excellence Program Newsletter 2 Nov, Newsletter sent out to more than 2,781 trade/travel agents to enroll in the STS Excellence program, Contacts: 2,467, Opening rate: 23.1%, Click rate: 3%,

Click-to-open rate: 13.1%, Swiss Travel System, Grand Train Tour of Switzerland

Health Newsletter 16 November, Medical newsletter sent out to more than 12,275 GCC Doctors and some medical dealers, Contacts: 12,275, Opening rate: 16.9%, Click rate: 7.9%, Click-to-open rate: 46.4%, Topic: Check-ups. Partners: Bad Ragaz, Hirslanden, UHZ, Hôpital de La Tour, Privatklinik Bethanien, Merian Iselin Clinic

Winter Inspirations Booklet 2023/24 December 2023, Production of 10'000 winter brochures including 17 hotels, 2 destinations and First Ski Experience. 5'000 physical brochures were distributed through hand out at mall activation in Jeddah and Riyadh. 5'000 digital brochure downloads at mall activation in Jeddah and Riyadh. Raffle draw to win 2 overnights on in Davos and Interlaken. Total of 1'000+ newsletter subscribers, Regions: Interlaken, Davos, SWISS, STS.

Winter Newsletter 16 Dec. winter newsletter sent out to more than 14,687 B2B and B2C contacts, Contacts: 14,687, Opening rate: 18.3%, Click rate: 4.3%, Click-to-open rate: 23.2%, Partners: Interlaken, Davos

Davos Klosters Winter Fb/Insta 15 – 27 Dec 2023. Winter facebook Video campaign targeting Arabic speaking families in the GCC. Impressions: 2,004,529, Clicks: 71,052. Reach: 919,712, Davos Klosters

Medical Facebook Campaigns Dec/Jan, Facebook campaign. Several posts. Various targeting, all health partners included.

Winter Hotel digital push. Facebook 500 CHF boosted post for each hotel partner.



Swisstainable at COP28. Logo presence at 6 start-up booths on showground: 8,000 direct contacts, COP28 brochure distributed: 11,500 contacts, Switzerland flyer with Swisstainable page:

800 contacts. Soirée at Residence of Consul General in Dubai with Bertrand Piccard as speaker: 35 VIP guests, Carton panel with ST logo at all 4 soirées, Swisstainable and presence on SwissTrade website

KAM

Al Rais Winter Campaign: Date: 13 November – 10 December. 50 radio spots Al Arabiya Radio (reach 1'500'000). 20'000 flyers distributed through Dar Al Khaleej newspaper, Social media: Instagram, Facebook & Twitter (reach 100'000), Digital: landing page on Al Rais Holidays website, Total reach: 1'620'000. Partners: Davos & Interlaken

Health Mission 20.-24. November: Meetings with Luxury Concierge, Medical & Travel Agents, Government Medical Departments, Private Clinics, VIP Events in Dubai (25 Guests) at the Four Seasons, Riyadh (50 Guests) at the residence and Doha (20 Guests) at the residence. Partners: TKP, Aesthetics, Neoviva Bad Ragaz, La Tour

GCC Workshop in Crans-Montana, 12 – 14 December 2023. 66 GCC travel agents joined the workshop and met 77 Swiss partners in Crans-Montana. The workshop enabled more than 1000 meetings between suppliers and buyers. 9 fam-groups with 9 different pre/post tours covered all GCC key partners.

KMM

Date: 14 – 17 November: 5 journalists travelled to Lucerne: Al-Shabibah Newspaper, Signature Oman, OER (Oman Economic Review), Oman Newspaper, Alam Al-Iqtissad. Partners: Lucerne, Edelweiss Airline



1. Priority Markets

GERMANY

Market Situation

Vertrieb.

Der touristische Vertriebsklima-Index der Unternehmensberatung Dr. Fried & Partner für Dezember zeigt im Vergleich zum Vormonat eine leichte Verschlechterung der Stimmung. Allerdings gibt es einen optimistischeren Ausblick auf die künftige Nachfrage. Der Anteil der positiv gestimmten Teilnehmenden sinkt von 56 auf 52 Prozent, während 38 angeben, dass der Vertrieb befriedigend sei (Vormonat: 39%). Ein größerer Teil als im Vergleich zum Vormonat bewertet die Lage als schlecht (9%, Vormonat: 6%). Die Prognose für die Nachfrage nach Reiseleistungen in den nächsten sechs Monaten zeigt im Vergleich zum Vormonat eine leichte Verbesserung. 30 Prozent der Befragten erwarten eine Steigerung (November: 24%), während 16 Prozent einen Rückgang prognostizieren (Vormonat: 21%). Eine stabile Mehrheit von 54 Prozent geht davon aus, dass die Nachfrage auf dem aktuellen Niveau bleiben wird (November: 55%). Insgesamt bleibt die Stimmung überwiegend positiv.

Konsum.

Die Deutschen haben wieder etwas mehr Kaufkraft. Das zeigt eine gemeinsame Studie des Konsumforschungsunternehmens GfK und des Nürnberger Instituts NIM. Noch lasse sich nicht sagen, ob es sich beim aktuellen Anstieg um den Beginn einer nachhaltigen Erholung der Konsumstimmung handele, sagte Rolf Bürkl vom NIM. Die Sorgen der Konsumenten seien nach wie vor groß. Geopolitische Krisen und Kriege, stark steigende Lebensmittelpreise sowie die Diskussionen über den Bundeshaushalt sorgten für Verunsicherung. Der größte Faktor für die Verbesserung zum Jahresende sind laut der Befragung die Erwartungen zum Einkommen: Die Menschen könnten auf höhere Löhne und Gehälter hoffen. Ein Drittel habe geantwortet, dass bereits erfolgte oder in Aussicht stehende Lohnsteigerungen zu einer optimistischen Bewertung führten.

Wirtschaft

Die deutsche Wirtschaft erholt sich in den kommenden Jahren. Das geht aus der aktuellen Deutschland-Prognose vom 15. Dezember 2023 der Deutschen Bundesbank hervor. Gegenwärtig bremst vor allem noch die schwache Auslandsnachfrage die Industrie, zudem zeigt sich der private Konsum zögerlich und die höheren Finanzierungskosten dämpfen die Investitionen. Doch das Bild hellt sich bald auf. Ab Beginn des Jahres 2024 dürfte die deutsche Wirtschaft wieder auf einen Expansionspfad einschwenken und nach und nach Fahrt aufnehmen, sagte Bundesbankpräsident Joachim Nagel. Auch bei der Inflation zeigt die Deutschland-Prognose eine Verbesserung: Die Teuerungsrate wird sich demnach 2024 im Vergleich zu diesem Jahr mehr als halbieren. Der Deutschland-Prognose der Bundesbank zufolge legt das kalenderbereinigte reale Bruttoinlandsprodukt (BIP) im kommenden Jahr um 0,4 Prozent zu, nach einem leichten Rückgang um 0,1 Prozent in diesem Jahr. In den Jahren 2025 und 2026 wächst die Wirtschaft um 1,2 Prozent beziehungsweise 1,3 Prozent. Sie profitiert vor allem von zwei Faktoren: Infolge wieder expandierender ausländischer Absatzmärkte steigen die Exporte. Und aufgrund des stabilen Arbeitsmarktes, kräftig steigender Löhne und rückläufiger Inflation geben die privaten Haushalte wieder mehr Geld für den Konsum aus.



Best practice competitors

Berlin Travel Festival: Die ehemalige Endverbrauchermesse der ITB heisst Berlin Travel Festival und fand vom 1.-3.12.2023 statt. 120 Aussteller haben sich auf dem Messegelände den Gästen präsentiert. Neben Destinationen wie Thailand und Jordanien waren Tour Operator, Lifestyleprodukte und Mobiliätsangebote vor Ort. Der Oman war offizielles Gastland des Berlin Travel Festival 2023.

Campaigning & Activation

MICE Newsletter zum Thema winterliche Veranstaltungsmöglichkeiten an 1'875 Empfänger.

TikTok Chalet Dez'23 -Jan'24: Zwei deutsche TikTok Influencer reisen nach Arosa Lenzerheide und ins Berner Oberland. Auf der Reise entdecken die beiden Skigebiete und weitere Wintererlebnisse. Der Content, der entsteht, wird im Januar bezahlt über Social Media in Deutschland ausgespielt.

KAM

MICE.

Am 6. November war SCIB DE bei **Seconds To WOW & Location Award** in Hannover, zusammen mit fünf nominierten Eventlocations aus der Schweiz. SCIB präsentiert sich am Event zusätzlich mit Videos, Bildern und einem kleinen Stand. 188 Teilnehmende, gefolgt von Newsletter.

BCD M&E Event in Zürich am 09. November, SCIB DE hat 18 Termine mit BCD Planern aus ganz Europa durchgeführt.

Networking-Event in Stuttgart am 15. November mit 17 Eventplanern und 6 Schweizer-Partner gefolgt von einem Newsletter.

Sales Calls mit den Regionen Davos und Crans-Montana vom 13. - 15. November in den Städten Wiesbaden, Heidelberg, Mannheim, Braunschweig, Hannover & Hamburg.

IBTM in Barcelona vom 28. - 30. November. SCIB DE hatte 32 Termine mit Kunden aus Agenturen sowie Corporates.

KAM.

LuxusFamTrip vom 29. November bis 02. Dezember mit 18 Reiseprofis nach Arosa und Zermatt sowie Luzern und Interlaken.

Webinar mit Arosa Tourismus mit 55 Teilnehmende gefolgt von Newsletter

KMM

Medienreisen 2023: Über 260 Journalisten und andere Multiplikatoren sind im Jahr 2023 mithilfe von ST Deutschland in die Schweiz gereist und haben darüber berichtet. Das ist ein Zuwachs von 4% ggü. VJ.

Swiss Cities Dinner in München: Am 14.11.23 fand das Mediendinner in München zur Präsentation der Schweizer Städte statt. Neun Stadtvertreter:innen waren vor Ort. Erzählung einer



selbstgeschriebenen Sage, begleitet von Akkordeonklängen und Illustrationen. Die Veranstaltung hinterliess beim Publikum einen bleibenden Eindruck dank der Verschmelzung von Storytelling, Musik und visueller Kunstfertigkeit.

GMR Chocosuisse

Auch in diesem Jahr wurde gemeinsam mit Chocosuisse und 4 Regionenpartnern eine Gruppenmedienreise zum Thema Schokowelt der Schweiz organisiert und sehr erfolgreich durchgeführt. Insgesamt haben sich 23 Journalisten auf 8 Plätze beworben. Wichtige Medien wie SZ, dpa und Bild nahmen teil und bis dato zählen wir schon 20 Veröffentlichungen.

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

MICE.

Advertorial und Beitrag im **CIM Magazin** zu den Neuigkeiten im MICE Bereich Schweiz.

Beitrag im Magazin **mep** - Fachzeitschrift fürs Int. MICE-Business zu den Neuigkeiten im MICE Bereich Schweiz.

Future Activities

ITB 2024: Die grösste Tourismusfachmesse ITB findet nächstes Jahr vom 5. bis 7. März in Berlin statt. Schweiz Tourismus wird auf einer Fläche von 235qm die Reisedestination Schweiz präsentieren.

Skianuary: Im Januar 2024 dreht sich alles rund ums Thema Skifahren in der Schweiz. Auf interaktive Art und Weise inspirieren wir jeden Tag auf's neue für einen Skiurlaub in der Schweiz. Die Digitalkampagne ist breit aufgestellt live: Instagram, Facebook, Snapchat, Radio Energy, Skiinfo.de und in Instagram Stories von Content Creatoren.

Swisstainable Kids

Wir etablieren gemeinsam mit REKA Feriendörfern ein Reiseangebot für Familien und bringen Kinder mit ihren Familien in die Schweiz, damit diese ein Gefühl für Nachhaltigkeit (Natur, Kultur) entwickeln und lernen.

Die einwöchigen Reisen, die im August 2024 stattfinden, bestehen aus zwei Leistungskomponenten: Der Unterbringung in einem REKA - Feriendorf und einem zubuchbaren, «swisstainable» Reisepaket für die ganze Familie mit einer vielfältigen Auswahl an „Swisstainable“ Aktivitäten. Das Angebot wird crossmedial in Deutschland vermarktet mit Fokuszielgruppe Bayern & Baden-Württemberg.

Interesting observations

Neue Botschafter in Deutschland: Die neue Schweizer Botschafterin Livia Leu hat ihr Amt am 1. November 2023 angetreten. Die ehemalige Chefunterhändlerin für die Beziehungen mit der EU wurde am 8. Dezember offiziell vom deutschen Bundespräsidenten Karl-Walter Steinmeier im Schloss Bellevue in Berlin akkreditiert. Sie ist die Nachfolgerin von Dr. Paul Seger.

“Davos 1917”: Die deutsch-schweizerische Co-Produktion läuft zur Primetime im Ersten und in der ARD Mediathek. Der alpine Kurort Davos ist der historische Schauplatz der Spionage-Serie, die während des Ersten Weltkriegs spielt.

Bahnstreik: Die Gewerkschaft der Lokführer (GDL) kündigt für Januar Warnstreiks zwischen drei und fünf Tagen an. Sollte die Deutsche Bahn (DB) nicht auf die Forderungen der Gewerkschaft eingehen, droht eine Abreitsverweigerung der Lokführerinnen und -führer ab 8. Januar 2024.

Deutscher Presserat rügt KI-Ausgabe: Die Zeitschrift "Lisa" der Verlagsgruppe Hubert Burda Media hat künstlich generierte Bilder nicht gekennzeichnet und kassiert dafür eine Rüge für das mit Hilfe von künstlicher Intelligenz (KI) erstellte „Extraheft Lisa Kochen & Backen“. Der Fall hatte im Frühsommer für Aufregung gesorgt.



1. Priority Markets

GREATER CHINA

Market Situation

Overall slow down towards the end of the year

Economic situation still somewhat surprised

Best practice competitors

Middle East, Australia & New Zealand and some asian destinations restart the incentives support policy in China market.

Campaigning & Activation

successful conclusion of Swisstainable activities

KAM

SCIB:

- IBTM presence in Barcelona and met Chinese buyers at fair (28-30 Nov)
- KAM gathering training meeting in Beijing in December.

KMM

- Winter KOL trip to DDK beginning December
- STS media gathering in Beijing, Shanghai and Chengdu
- Radio livebroadcasts for winter topics
- media year-end report look back 2023
- year-end awards

Future Activities

Planning for 2024 concluded, with a focus on:

- Culture Activities



- Winter Festival
- STE in Shanghai
- Digital Campaign targeted at different personas
- Swisstinable travel guide
- Luxury Mart etc.

Interesting observations

- Chinese owned companies for international events in Europe are getting more and more frequently now.



1. Priority Markets

ITALY

Market Situation

The Italian National Tourist Board's (ENIT) recent study reveals a significant trend among Italians: nine out of ten are already making plans for their 2024 vacations, with a substantial inclination towards outdoor and camping holidays.

This shift towards independent and nature-centric travel is particularly pronounced in the 35-54 age group, indicating a growing preference for experiences that blend freedom with the beauty of the natural world, according to a report by ENIT.

Italian travelers in 2024 are poised to embrace novel experiences and destinations, with a notable increase in solo travel. Planning habits vary, with nearly half organizing their trips months ahead, while a fraction prefers last-minute deals.

As per ENIT, outdoor vacations are gaining traction, especially among those aged 35-54, as evidenced by increased spending in this sector.

Beyond traditional summer getaways, many Italians are now considering autumn and winter travel, particularly for Christmas and New Year's escapes.

The Italian traveler's profile is evolving, with a surge in solo travel and a quest for unique experiences. Younger generations are particularly inclined towards journeys of self-discovery and independence, showcasing a shift in travel motivations and preferences.

Accommodation choices are increasingly influenced by unique offerings, with many Italians prioritizing destinations based on specific hotel amenities, particularly those that allow for an immersive experience in the local environment.

The 2024 outlook for Italian tourism is marked by a decisive turn towards outdoor adventures and camping. This trend mirrors a broader shift in travel preferences, underscoring the dynamic nature of the industry and its potential for sustainable and community-centric growth.

The economic footprint of outdoor tourism is significant, with higher expenditures noted in this sector. Viewed as a new form of luxury, outdoor holidays offer an amalgamation of natural immersion and freedom, resonating with the modern traveler's aspirations.

Campaigning & Activation

Campaigning & Activation: Vaud Promotion - 2 pages adv in ballet program of "Teatro alla Scala" Milano - Onegin (Roberto Bolle)

Date: 05.11.2023

2 pages advertising in the ballet program Onegin (Roberto Bolle) of "Teatro alla Scala", which is distributed to all guests on location.

Partner: Vaud Promotion

Contacts: 5'000



Campaigning&Activation: Ecoluxury Fair Workshop

Dates: 09. - 10.11.2023

What: Ecoluxury Fair organized by I Viaggi dell'Elefante

One to one pre fixed meetings of 15 minutes

Partners: Vals 7132

Qualified reactions: 40 contacts

Target: Luxury travel from Italy and USA

Campaigning&Activation: HoKo - 6 pages advertorial in Scimagazine

Date: 15/11/2023

What: 6Pages advertorial on Scimagazine issue November and publishing on scimagazine.it to promote Snow Sports Hotels.

Contacts: 70.000

Campaigning&Activation: Distribution WINTER brochures with Sportweek

Date: 18.11.2023

Distribution of Winter brochures with weekly magazine Sportweek

Circulation: 30'000 copies

Area: Lombardia

Campaigning&Activation: HoKo - 1page advertisement in Scimagazine

Date: December

What: 1Pages advertorial on Scimagazine issue November and publishing on scimagazine.it to promote Snow Sports Hotels

Contacts: 70.000

Campaigning&Activation: Bazar at Scuola Svizzera di Milano to promote Winter in Switzerland and Train Connections

Date: 24/11/23

What: participation at the Bazar of Scuola Svizzera di Milano to promote Winter holidays and Train Connections

150 Participants

Campaigning&Activation: Influencer Trip to Basel by Dorian Pellumbi

Period: 23.11 - 25.11.2023

What: influencer Trip to Basel by Dorian Pellumbi to promote Christmas Markets, @dorpell 250k followers

Content: N. 1 IG Post/day, N. 2 Reel (one in collab @MySwitzerlandit), min. 4 Instagram Stories/day,



Highlight Stories Folder, Full Buyout Photography

Partner: Basel

Campaigning&Activation: Lugano - Influencer Trip Giorgio Rocca

Period: 30.11.2023

What: Trip to Lugano with Giorgio Rocca (55K followers)

Contents: 17 stories

Partner involved: Lugano Region

Campaigning&Activation: HoKo - Social Media Campaign @rivista_scimagazine

Date: 14.11. – 15.12.2023

What: Promotion of Snow Sports Hotels publishing 3 posts on Instagram and Facebook @rivista_scimagazine with link to the article published in November

IG 24k followers / Facebook 7,3k followers

Campaigning&Activation: Influencer Trip to Bern by Marko Morciano

Period: 01. - 03.12.2023

What: influencer Trip to Bern by Marko Morciano to promote Christmas Markets and Events im Bern, @markomorciano 103k followers

Content: N. 1 Reel in collab @MySwitzerlandit, Stories

Partner: Bern

Campaigning&Activation: Event Exclusive Interlaken, STS, RhB in Rome

Date: 04.12.2023

What: Event for medias and trade in Roma c/o Porto Fluviale. Show cooking with Christmas biscuits, dinner and Dj Set

Contacts: 32 medias and 42 travel agents in coop with Albatravel t.o.

Focus: Winter in Interlaken, new train connections, GTToS

Campaigning&Activation: Christmas Dinner GIST (Gruppo Italiano Stampa Turistica)

Date: 05.12.2023

What: Traditional Christmas Dinner organized by GIST in Una Hotel in Roma

Contacts: 70 journalists specialized in tourism from central and south Italy

Campaigning&Activation: Christmas Party in Rome

Date: 11.12.2023

What: Christmas Party organized by Travel Quotidiano in Roma

Contacts: 100 travel agents/tour operator



Calendar BLS (november 2024)

Partners: BLS, RhB

Campaigning&Activation: Christmas Dinner Il cenacolo dei Viaggiatori

Date: 17.12.2023

What: aas Dinner organized by the cenacolo dei viaggiatori

Contacts: 250 persons

Distribution of our brochures

Partners: STS, SCM

Campaigning&Activation: Challenge in 40 Virgin Active Fitness Clubs to promote 7132Hotels Vals

Period: 08. - 22.12.2023.

Challenge in 40 Virgin Active Premium Gym Clubs from North to Central Italy to promote Vals 7132Hotels

Challenge for all club members

Participants: 7.039

Digital: PromoSvizzera Christmas/Lucerne- Swiss cities_Michelle Hunziker - Editorial article - Repubblica.it

Period: 01. - 15.11.2023

1 editorial article on Repubblica.it (geotarget: Milano) to promote EC train and Luzern

Sessions: 2.662

Digital: PromoSvizzera Christmas - Swiss cities_Michelle Hunziker - Libero.it-Virgilio.it

Date: 04. - 05.11.2023

Advertising campaign with big format in Libero and Virgilio login webmail.

Focus on special fare "Promo 2x1 Mercatini" to reach swiss cities during Advent.

Geotarget Lombardia

Link to svizzera.it/intreno

Contacts: 585.037

Digital: PromoSvizzera Christmas/Lucerne - Swiss cities_Michelle Hunziker - Social media - Repubblica.it

Period: 06.11.2023

Facebook post to promote editorial article about Luzern and EC trains.



Reach: 23'462

Digital: PromoSvizzera Christmas - DEM Trenitalia to Cartafreccia owners

Date: 7.11.23

Newsletter sent to Cartafreccia owners about special fare "Promo 2x1 Mercatini" to reach swiss cities during Advent.

Delivery rate: 390'000

Open rate: 18%

Area: Lombardia

Partners: STS and Swiss Cities

Digital: PromoSvizzera Christmas - Swiss cities_Michelle Hunziker - Libero.it-Virgilio.it

Date: 11. - 12.11.2023

Advertising campaign with big format in Libero and Virgilio login webmail.

Focus on special fare "Promo 2x1 Mercatini" to reach swiss cities during Advent.

Geotarget Lombardia

Link to svizzera.it/intreno

Contacts: 493.320

Digital: E-Newsletter November.

Date: 13.11.2023

What: ST E-newsletter November

Focus:

Promo 2x1 Trenitalia (216 clicks)

Nuova mostra al museo FIFA di Zurigo (34 clicks)

Sent: 16'160

Open rate: 35.02%, clicks: 1461

Digital: PromoSvizzera Christmas - Swiss cities_Michelle Hunziker - Libero.it-Virgilio.it

Date: 18/19.11.2023

Advertising campaign with big format in Libero and Virgilio login webmail.

Focus on EC trains to reach swiss cities during Advent.

Geotarget Lombardia

Link to svizzera.it/intreno

Contacts: 1.161.788



Digital: PromoSvizzera Christmas - Swiss cities_Michelle Hunziker - Lastminute

Period: 06. - 30.11.2023

Banner advertising campaign on Lastminute.it, Volagratis.it and its network.

Focus on EC train special 2x1 fare to reach swiss cities during Christmas markets time.

Link to svizzera.it/intreno

Contacts: 1.935.342

Digital: PromoSvizzera Christmas - Swiss cities_Michelle Hunziker - Lastminute

Period: 06. - 30.11.2023

social advertising campaign on Lastminute.it, Volagratis.it and its network.

Focus on EC train special 2x1 fare to reach swiss cities during Christmas markets time.

Link to svizzera.it/intreno

Contacts: 17.584

Digital: PromoSvizzera Christmas - Swiss cities_Michelle Hunziker - Display adv - Repubblica.it

Period: 16. - 30.11.2023

Display campaign on Repubblica.it to promote EC train to reach Swiss cities during Advent

Size: big rectangle

Subject: MH onboard EC with Lausanne in the window

Link to Svizzera.it/intreno

Contacts: 2.003.305

Digital: Berne - Social media - Repubblica.it

Period: 13. - 19.11.2023

IG/ FB post to promote editorial article about Bern during Christmas time.

Reach: 23'140, impressions: 23'501, click: 72

Digital: Berne - Display adv - Repubblica.it

Period: 13. - 26.11.2023

Display campaign on Repubblica.it to promote Christmas time in Bern

Size: big rectangle

Impressions: 1'351'963, clicks:1'551

Digital: Berne - Editorial article - Repubblica.it

Period: 13-26.11.2023



1 editorial article on Repubblica.it (geotarget: Milano) to promote Bern during Christmas time

Views: 2'565

Page duration Avg: 00:03:08

Digital: Bern - Social media - Repubblica.it

Date: 25.11.2023

Instagram/ facebook post to promote editorial article about Bern New Year's eve in Bern and shopping

Reach: 22.'201, impressions: 22'640, click: 27

Contacts: 22.640

Digital: PromoSvizzera Christmas - Swiss cities_Michelle Hunziker - Libero.it-Virgilio.it

Date: 25/26.11.2023

Advertising campaign with big format in Libero and Virgilio login webmail.

Focus on EC trains to reach swiss cities during Advent.

Geotarget Lombardia

Link to svizzera.it/intreno

vedi specifiche

Contacts: 759.987

Digital: Bern - Editorial article - Repubblica.it

Period: 21. - 27.11.2023

1 editorial article on Repubblica.it (geotarget: Milano)

New Year's eve in Bern and shopping

Views: 2'054

Page duration Avg: 00:02:10

Digital: Basel - Editorial article - Repubblica.it

Period: 27.11. - 03.12.2023

1 editorial article on Repubblica.it (geotarget: Milano)

Christmas time in Basel

Views: 2'242

Page duration Avg: 00:01:47

Digital: Basel - Social media - Repubblica.it

Period: 27.11. - 03.12.2023



Instagram/ facebook post to promote editorial article about Basel Christmas time

Reach: 22'782, impressions: 23'722, click: 66

Digital: Basel - Display adv - Repubblica.it

Period: 27.11. - 03.12.2023

Display campaign on Repubblica.it to promote Christmas time in Basel

Size: big rectangle

Impressions: 675'486, clicks: 442

Digital: PromoSvizzera Christmas - Swiss cities_Michelle Hunziker – Instagram

Period: 01.11. – 10.12.2023

Sponsored post in Instagram.

Focus on special 2x1 fare in Eurocity tickets to reach swiss cities during Christmas markets

Geotarget Lombardia

Contacts: 1.137.212

Digital: PromoSvizzera Christmas - Swiss cities_Michelle Hunziker – X

Period: 01.11. – 10.12.2023

Sponsored post in X.

Focus on special 2x1 fare in Eurocity tickets to reach swiss cities during Christmas markets period.

Geotarget Lombardia

Contacts: 2.374.842

Digital: E-Newsletter December.

Date: 01.12.2023

What: ST E-newsletter December

Focus: 5 tips for a weekend on the snow (170 clicks)

- Visiting museums during Christmas time (65 clicks)

Sent: 16'159

Open rate: 35.69%

Total Clicks: 1218

KAM

KAM: roadshow in Brescia



Date: 21.11.2023

What: travel Open Day in Brescia c/o Hotel Vittoria

Partners: BLS, Bern, Adrastea Viaggi, RhB

Contacts: 43 participants

KAM: Fam Trip Bern and Trenino Verde delle Alpi

Date: 30.11. - 02.12.2023

Focus: BLS, Bern Welcome

Participants: 6 travel agents and 1 trade magazine

KMM

Media result

- 21 million
- 29 journalists invited to Switzerland
- 1 media newsletter about How to Winter and winter multimedia stories /

Top coverage

- Reportage about Lausanne during Advent on monthly travel magazine Bell'Europa (contacts: 37'500; publication date: 01.12)
- Article on newspaper L'Eco di Bergamo about Bern (contacts: 257'000; publication date: 10.12)
- Article on weekly magazine Intimità about Basel (contacts: 385'000; publication date: 13.12)
- Reportag about Val Ferret on monograph Meridiani Montagne (contacts: 96'000; publication date: 01.11)
- Article on Lastampa.it/viaggi about Bob run in Engadin (contacts: 55'000; publication date: 30.11)

Group media trip

- Trip in Basel (12-14.12.2023) focus on Christmas Markets and Pavillon Novartis; Participants: 7 journalists and 1 tv troupe from Veneto.
- Trip in Verbier and Pays du St. Bernard (11-13.12.2023) focus on ski & wellness; Participants: 6 journalists.
- Trip in Zurich (30.11-02.12.2023) focus on Christmas Markets; Participants: 4 journalists from Rome.
- Trip in Bern (30.11-02.12.2023) focus on Christmas Markets and Trenino Verde delle Alpi; Participants: 5 journalists.



1. Priority Markets

NORTH AMERICA

Campaigning & Activation

Campaigning & Activation

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

KAM

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
- M&I Luxe, Mexico, Dec 11 - 14
- Engage, Boca Raton, Dec 11 - 14
- Holiday Eblast, Dec 19

KMM

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

Campaigning & Activation

Hotel Luxury Promotion 2023:

- Sponsorship with Forum Club London
- Promotion of Hotel Collection Luxury Hotels & Homes, 100% financed via Hotels (CHF 35k)
- Forum event with 150 people (incl. Black Tie Dinner) took place on 16 November with the following hotels:

Omnia Hotel, Living Circle, Dolder Grand, Cambrian Adelboden, Bürgenstock Hotel

- Each hotel had the opportunity to present their hotel and to mingle with the Forum members

Telegraph Always On Promotion:

- Swiss Winter Magic – featuring Cities, especially Christmas markets
- 4x online articles covering all A-Cities to promote a Christmas/Winter message to reach 4 Mio impressions
- Hotel online AMP story, incl. 1-print page and a Telegraph Extra competition featuring Snow Sports Hotels

NatGeo Cities Promotion:

- Cities promotion continues in December with the final contributions of:
- Lucerne online article featuring winter activities
- Lucerne print article 2.0 in Jan/Feb issue (published by 7 December)

The [CH-hub](#) has been updated with all the evergreen content we've produced.

Swiss Public Transportation Promotion

- Promoting GTToS in two elements
- Out of home promotion on selected train stations in central London with Roger D6 ads
 - est. 3.6 Mio impressions
- Geo-optimised digital advertising delivered across mobile app network (100+ apps like weather, utilities, travel, sports, shopping)
 - est. 1.5 Mio impressions

Health Tourism Promotion at the Swiss Embassy: British-Swiss Chamber of Commerce Christmas's reception:

- Networking and distribution of 150 Health Magazines) together with SWISS, Hôpital de la La Tour &



Kempinski Engelberg we also sponsored the Grand Prize of the evening

Winter Promotion 2023/24

Skate at Somerset House opened on 15 November and will run until 14 January 2024

- Events Chalet Suisse - Nov & Dec
- KAM, KMM & SCIB
- VIP Skate Opening – 14 November
- 450+ guests total, incl. ST: 120 approx.
- ST event - Chalet Suisse
- Valais partners attended + SWISS delegation
- Goody bags – x450 distributed
- Partner sponsored sessions:
 - 26 Nov (BE), 3 Dec (VS) - Sundays, 3pm
- Little Suisse Pop Up
- In Somerset House courtyard
- Caotina Hot Chocolate/ Raclette (Käse Swiss)

Sidetracked Bernese Oberland Promotion

- Content collab - Bernese Oberland
- Interlaken & Jungfrau Region
- Focus topics integrated:
 - Alpine skiing, winter kayaking, ski touring with mountain guide, winter paragliding, snow-shoeing, Hot Tug on Lake Brienz

Content Mix:

- Video (film & social teasers), digital, paid & organic social, e-comms
- Content plan:
 - Feature story & destination guide
- Film per partner + social teasers & edits
- Organic & paid media + e-newsletter
- Live: November – Feb (2024)

KMM

1 November: Media lunch and dinner in London with partner Lucerne



7 November: Distribution Media NL

10 November: pre-opening Skate at Somerset House for media/content creators - filming for SRF Tagesschau

14 November: opening night Skate at Somerset House

20 November: Media event Dublin with partner Vaud

21 November: TravYule event London, sponsoring award category sustainability

22 November: Media event London with partner Zurich

30 November: Media lunch 'Valais at the Chalet' with partner Valais

11 December: Distribution Media NL



2. Active Markets

AUSTRALIA

Market Situation

The Australian economy finished the year in relatively good shape, however inflationary pressures remain high, and growth modest. The outlook for 2024 is that inflation is set to start to decline by the middle of the year, which will produce a decline in the high cost of living, and ideally increase spending on discretionary items (such as travel) from a broader section of the population.

The Australian outbound travel industry enjoyed a bumper year in 2023 with traveller numbers to many destinations now exceeding 2019. It is widely accepted that 2023 was “the year of Europe”, with travel to the continent being prioritised and a number of destinations (such as Italy and Switzerland*) on track for record years in terms of the visitation from Australia.

The cruise sector has also returned strongly in 2023, with Australians taking more cruises on average per head of population than any other nation.

Other strong performing destinations for Australia travellers in 2023 included the UK, Fiji and Bali. (The USA however is still significantly below pre-covid levels).

Notably the positive results to Europe were achieved despite airfares to Europe from Australia being on average 35% more than pre-covid, with capacity constraints an ongoing issue.

Best practice competitors

While a short-haul destination from Australia, Tourism Fiji has announced that it has attracted one million social media followers. The destination has only a small tourism team and relatively small budget, so this is an impressive achievement. Australia is Fiji’s key market, and the destination’s “happiness campaign” with local people telling the story of their culture and way of life has tapped into Australian travellers love of authenticity in choosing a travel destination.

Campaigning & Activation

- Cooperative campaign with Collette Tours and B2B media outlet KarryOn, including a competition for the travel trade. During the three week campaign, industry searches on Collette’s Switzerland product increased from 20 to the 2nd most popular.

- Cooperative campaign with Entire Travel and STS/STC across three trade B2B media outlets.

KAM

- Eight travel agents from Aust/NZ participated in a Winter and Christmas Markets fam trip in early December

- Attended the National Travel Industry Awards weekend events - Switzerland Tourism first time nomination as “Most Popular Tourism Board”



- Meetings with various tour operators including Infinity Holidays, SkiMax, International Rail, Rail Europe & Inspiring Vacations to discuss product extension in 2024.
- Hosted a VIP luncheon with 8 guests and hosts at the Residence of the Swiss Consul in Sydney. Swiss Ambassador also in attendance.
- Hosted a table of ten travel agents at the Council of Australian Tour Operators Christmas Luncheon. ETC was also the major sponsor at the event which provided further promotional opportunities for ST.

KMM

- Journalist Mark Daffey participated in the group media winter trip.
- Partnership with SnowsBest social media highlighting Engelberg and the Jungfrau Region
- Two page spread in print magazine International Traveller in partnership with Zermatt Tourism.
- Meeting with editorial team from International Traveller to discuss 2024 partnership plans.

Future Activities

- Sponsorship of Virtuoso's 20th anniversary lunch in Sydney.
- Participation in Entire Travel's three city roadshow - Sydney, Melbourne & Brisbane.
- Participation in Travel Associate's two day luxury travel summit on the Gold Coast.

Interesting observations

Focus on the luxury leisure sector continues to be strong in the Australian market with Flight Centre Travel Group announcing a new member portfolio for its newly launched "The Luxury Travel Collection". Comprising initially of 8 travel agencies, said to be hand-selected with discerning clients at the centre of their business strategy.

Key trade players in the local market, report that sales of luxury travel experiences continue unabated and are forecasting a strong performance for the sector in 2024.



2. Active Markets

AUSTRIA/HUNGARY

Market Situation

Hohe Inflation

Nach wie vor höhere Inflation als durchschnittlich in der EU (ytd: 8,55%). Dies trifft unterdessen auch die Mittelklasse - die günstiger einkauft, kürzer in den Urlaub fährt, auch günstigere Angebote wählt.

Preise in AT selbst sind auch stark bei den touristischen Angeboten gestiegen: Essen, Übernachtung, vor allem auch Liftkarten sind empfindlich teurer geworden; d.h. der Preis-Abstand zu den Angeboten in der Schweiz hat sich etwas reduziert.

Österreicher erwarten nun vorsichtig-ängstlich die weitere wirtschaftliche Entwicklung vor allem in DE, da dies der weitaus wichtigste Handelspartner von AT ist.

Bahnreisen (Panorama & Swiss Travel Pass) laufen aber nach wie vor sehr gut; wahrscheinlich wird neben den Sights / Natur vor allem auch die Nähe, Sicherheit, Kalkulierbarkeit der Schweiz geschätzt.

Campaigning & Activation

- 22. Oktober - 19. November 2023: 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)

- 1. November 2023: Advertorial „Klimafreundlich unterwegs durch die Schweiz“ im Magazin „Reisen“, 82'000 Auflage

- 15. November 2023: „Luxury Hotels & Homes“ Inserat im Vienna Deluxe Magazin, 35'000 Auflage (zusätzliche Platzierung im Munich Deluxe und Switzerland Deluxe Magazin on top)

- 22. November 2023: Bern-Advertorial im Magazin „Entdecken“ der Tageszeitung Der Standard, 50'000 Auflage

- 25. November 2023: Winter Magic Tour Advertorial im Magazin „Reise aktuell“, 44'000 Auflage

- 05. Dezember 2023: Bewerbung STS Produkte im TIP 8'000 Auflage

- 15. Dezember 2023: Promotion zu winterlichen Panoramazugreisen durch die Schweiz inkl. KAM Inserat von Hofer Reisen im Magazin „Gute Reise“, 50'000 Auflage

KAM

- Anfang November 2023: KAM Busmailing

- 22.-23. November 2023: BTB Messe Spielberg

- 12. Dezember 2023: B2B Newsletter



KMM

Presse e-Newsletter:

Im November und Dezember 2023 wurden 2 Presse eNewsletters an je 190 österr. JournalistInnen versendet.

Tourismuspresse.at-Aussendungen:

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

Medienreisen:

Im Dezember 2023 wurden Medienreisen für 4 österreichische und 2 ungarische MedienvertreterInnen organisiert.

Future Activities

- 15. Januar 2024: ÖBB Traumzüge katalog 70% Schweiz FIT und Gruppenreisen - Rückseite via STS gestaltet
- 23. Januar 2024: Kurier Leaserabend mit ÖBB RailTours
- Januar 2024: STS Upgrade Aktion



2. Active Markets

BRAZIL

Market Situation

MAIN FACTS ABOUT THE MARKET

The unfavorable news coming from abroad should interfere – negatively – in Brazilian's economic dynamic. That doesn't mean the positive direction the country has been achieving will be altered to the opposite orientation, but it could impact the growth pace.

The first one of them comes from the United States, with data on employment above expectation still indicating a quite heated economy, and, consequently, this brings an overload for the Federal Reserve, the American Central Bank, controlling inflation through the interest rates. Thus, the tendency is that the rate over there continues on the current threshold for a longer period, in a range varying from 5.25% and 5.5% a year, reducing the chances of cuts in the short term.

Given the relevance of the American economy, this movement generates an effect on the global currencies, and Real also suffers from that. Previously oscillating around 4.80 reais (R\$ 4.80) per dollar, currently it is back to valuing above 5 reais (R\$ 5). Another important fact is the war in Israel. It's still too soon to evaluate the economic impacts from this lamentable event. So far (when this analysis is being written), international prices such as the oil and agricultural commodities haven't skyrocketed, differently from what occurred a little more than a year ago at the beginning of another conflict between Russia and Ukraine.

In the domestic scenario, the Central Bank cut the basic interest rate, going from 13.25% to 12.75% a year once again. The expectation was that for the next meeting, there would be a new reduction in the same magnitude. However, in the face of the new facts, the decision might be

for a slower pace, of 0.25 percentage point. Even due to the gap in interest in comparison with the United States, which has been reducing it, and ramping the dollar's attractiveness up.

Even with the elevated interests in Brazil, the credit continues to be very plentiful across financial institutions, for consumers and companies. Nevertheless, what is worth emphasizing as a challenge ahead, is the sequential increase in companies' default rate. In a year, beyond 8 billion reais (R\$ 8 billion) were not paid by the companies in a wide range of credit modalities. That's an alert sign showing that many companies could potentially stop operations, or they will need more time to solve financial issues, and only then think about investments, delaying a stronger pace of the economy's expansion.

Among the economic activities, the sign of weakening is clear. The manufacturing industry registered a slight increase of 0.5% in August, in the comparison with the same period last year. Regarding machines and equipment, the scenario is more challenging, since there was a 15.4% annual downturn, according to IBGE's data. Considering the services, there is a clear slowdown, going from an increase of 3.6% in July to a 0.9% rise in August. Nonetheless, this is also related to a higher comparison base, since the second semester of last year was marked by a stronger upturn in activities, mainly in the tourism sector. According to FecomercioSP, the Monthly Survey of National Tourism shows a 1.2% increase, in August, taking into consideration that in the same period last year the variation was 66%. The forecast for the end of the year predicts a rise slightly above 11%. Although it's a favorable moment, it's necessary to emphasize that it's expected there will be normal oscillations from now, with monthly downturns due to both a higher comparison base, and due to lower prices of some services in tourism, which impacts in the financial transactions.

In the Brazilian retail sector, in August, sales grew 2.3% in the annual counterbalance driven by the 5.6% increase in the supermarket sector. Most of the analyzed activities by IBGE showed negative



results, such as clothing (-7%), furniture and household appliances (-1.5%), and fuel and lubricants (-3.5%).

Brazilians have been expanding their buying capability each month, given the more controlled inflationary process and the heated job market. There are many families with overdue debts, which payments they are letting in for later. This is a limiting factor for the consumption performance for the mid- and long-terms.

And the agribusiness, which saw a spectacular year in 2022, goes through a moment with prices decreases. On one hand, this is good for inflation, but on the other, it interferes negatively with the gains, companies' investments in farms, and in income distribution. The weakening of the global demand, mainly by the main market, China, has brought this tendency for agricultural commodities. Therefore, the Brazilian economy goes through a moment with positive results, however, with a weaker pace and challenges ahead, external, and internal. Investors are keeping an eye on the fiscal framework, how and where the government will increase their revenues; to cover the increase in the expenditure that has already been planned for a near future, what can affect debt's control and the interest's direction. Instabilities and uncertainties, which aren't new in Brazilian's history.

IMPORTANT FACTS ABOUT THE MARKET

1) In September, the inflation was 0.26%, and it accrued 5.19% in 12 months. While the transportation group, which involves fuel, had a 1.40% monthly increase, the food, and beverages group, the one that weighs the most in the index, pointed to a 0.71% deflation.

2) In August, 221 thousand formal job positions were opened across the country, with the service sector being in the spotlight, showing a 114 thousand balance. In the period from January to August, there were 1.4 million additional people in the formal job market.

CONFIDENCE INDEXES

The Consumer Confidence Index (ICC) registers the second consecutive rise and reached, in September, 132.6 points, 1.2% above the previous month, and an 18.9% growth in the annual counterbalance. This has been the highest level since February 2019. The improvement in confidence of people in São Paulo is correlated with a lower inflation and with the higher generation of jobs. Families' main consumption group, food and beverages, registered a 0.70% deflation in September. This lower pressure in the budget creates room for an expenditure expansion in other areas of the economy.

The Trade Entrepreneur Confidence Index (ICEC) points to an increase of 2.2% in September, in comparison to August, being the third consecutive one. However, differently from the ICC, the ICEC is 6.9% below the level of September 2022. This upturn in the last months has been a consequence of families' higher buying power and, at the same time, a lower pressure on companies' costs, contributing to the applied margin.

TRAVEL AND TOURISM

Brazil is preparing for the summer high season, the greatest period for trips in the country. The expectation is very positive, although it still presents some bottlenecks, especially in the air sector. Check out some perspectives for the next months:

- The domestic tourism is trendy, however, with the flight offer being nearly the same one as last season. That's because the airlines suffer with the lack of new airplanes, due to the delay coming from the manufacturers.
- The International tourism is growing, but the flight offer hasn't reached pre-pandemic levels yet. Europe still has the advantage of having more flights and presenting better prices in comparison to the United States.
- The expectation is to end the year with more than 1.5 million Brazilian visitors in the United States,



still a lower number compared with the 2.2 million in 2019.

- 5.8 million Brazilians already have the American visa and are able to travel.
- 1.3 million Brazilians should get the American visa this year.
- Waiting lines are occurring for visas that are being requested for the first time. The average waiting period to get a visa to the US is 190 days (it has already reached 660 days in June of this year). The U.S. Consulate's estimation in São Paulo is to end the long lines by June 2024.
- The American air carriers are also starting the phase of seasonal increase in flights: American Airlines and Delta Air Lines will have additional flights from São Paulo and Rio de Janeiro to the United States.
- Great American attractions and theme parks should finish 2023 with the indicators equal to the ones in 2019, and Brazil is Top 3 in the main parks in Orlando, Florida.
- Despite the preference for Florida, in the United States, other destinations can already see an increase in Brazilians' demand, such as New York and California.

TRAVELERS' PROFILE

Google has recently disclosed an unprecedented study about Brazilian travelers' new consumption behavior, which has changed quite a bit from 2019 to 2023.

According to the study, the new featured behaviors are:

1 Tourism in Brazil becomes terrestrial

Currently, the new traveler seeks, predominantly, smaller-distance routes, as for national destinations, aiming shorter itineraries. According to Google, there was an increase of 156% in the search for routes totaling up to 250 kilometers of distance from 2019 to 2023, while the search for routes with up to 3.5 thousand kilometers decreased 77% in the period. "This generates a structural change of Tourism in Brazil, which becomes a terrestrial Tourism", Martiniano points out.

2 Half of consumers' interests are regarding accommodation.

Accommodation, which in 2019 represented 35% of the interest of Brazilian consumers, currently represents 50%. From 2019 until now, the search for hotels increased 99%, while the search for airlines increased 1%, reaching the same threshold as in 2019.

3 The traveler's journey is digital

Nowadays, the discovery journey of travelers is predominantly digital. Searches on Google and on YouTube are leading, and apps have a prominent role in the country. Brazilians pass 5h20m per day on apps, just staying behind Indonesia.

4 Tourism can become protagonist on Black Friday

The Tourism segment presents great potential on Black Friday. Google's studies show that 71% of consumers want to buy trips on Black Friday, but 49% have never bought them, so there is indeed a demand and interest for purchasing trips within the period.

The interests of the traveler who buys on Black Friday is, mainly, on:

1o place – Accommodation (60%);

2o place – Package Deals (59%);

3o place – Flight Tickets (53%);



- 4o place – Sightseeing Tours (41%);
- 5o place – Tickets for Tourist Attractions (26%);
- 6o place – Car Rental (25%)
- 7o place – Bus Tickets (17%);
- 8o place – Cruises (16%).

The study also indicates that offers or package deals for trips ranging from four to ten days can have emphasis for consumers, as well as personalized offers beyond ten days for the high-end public.

5 Favorable consumption scenario

The economic scenario in Brazil brings an optimistic perspective this year. When questioned if the economy in the country will be better by the end of the year, 51% of Brazilians answered yes, considering as well that their own financial situation will improve. That means a consumption longing; Brazilians are more optimistic.

WHAT BRANDS AND DESTINATIONS ARE THE MOST SEARCHED FOR IN TOURISM?

In the browse on Google, the airlines lead the ranking.

Gol (7.8%); Latam (7%); Google Flights; And Azul.

As for searches for generic terms, “beach” is the preferred one of Brazilians.

In the search for destinations, Rio de Janeiro prevails in Google’s searches, while internationally, Orlando is the most browsed destination. This isn’t exactly new, but now Curaçao is also in the spotlight, presenting a monthly growth.

Campaigning & Activation

KAM/CAMPAIGNING & ACTIVATION: Xmas Giveaways - Switzerland Tourism Brazil team delivered Xmas Giveaways including Lindt chocolate, hand-painted Christmas ornament and customized festive season message to 30 main trade contacts and partners from the luxury market of São Paulo.

KAM/KMM/Campaigning and Activation: The Traveller by Teresa Perez – Switzerland Guide.
Campaign period: November 2023 – April 2024. 169 pages of breathtaking imagery and inspirational content, unveiling the wonders of Switzerland. 5K copies for b2b & b2c distribution: 4,250 direct clients + 500 TAs + 250 TP stock for gifts and events. Switzerland Tourism is the primary and major sponsor of this project, ensuring that we have ample space to showcase all the attractive aspects and main destinations for the Brazilian market in this comprehensive Switzerland guide. Swiss partners involved in the project: Crans Montana Tourism (+ Crans Ambassador, Guarda Golf, LeCrans): Master Sponsor (12 pages); Geneva Tourism: Diamond Sponsor (10 pages); Jungfrau Region: Diamond Sponsor (10 pages); Interlaken Tourism: Diamond Sponsor (10 pages); Lucerne Tourism (+Mt Pilatus, Lake Lucerne Navigation Company): Platinum Sponsor (08 pages);Kulm Hotel St Moritz; The Dolder Grand; Mont Cervin Palace Zermatt; Carlton Hotel St Moritz.

In addition to the printed guide, the project also includes a 6-month online campaign through various media and marketing strategies. This encompasses the promotion of the guide across Teresa Perez's b2b and b2c online platforms. Promotion in relevant media via PR agency. E-mail marketing to 4K TAs and 20K final clients. Feature in TP website during the campaign period: 40k monthly views. Social media posts on TP channels (56,9K followers on Instagram & 1,5K subscribers on Youtube) +



Telegram (643 TAs subscribed).

08 November 2023 - Launch event in São Paulo. The event brought together approximately 100 guests, including the TP team, travel agencies, media representatives, and industry partners. Broadcast vídeo with personal message by Fabien Clerc, ST Brazil Market Director, and Pierre-Henri Mainetti, Head of Sales and Marketing | Crans-Montana Tourisme & Congrès. Switzerland Tourism presence: Mara Pessoa, Trade Manager; Natalia Leal, Marketing Manager; Ana Paula Pappa, Marketing Manager. Swiss partners presence: Interlaken Tourism & Jungfrau Region - Fernando Aquino, Latam Representative. Additional Swiss partners in attendance: SWISS, Xmart (MO Hotels), 1ER Destinations (La Reserve, Crans Ambassador);

CAMPAIGNING & ACTIVATION / KAM: Perfect Trip Event. Nov, 23th

Perfect Trip The Colletion promoted an event as an opening for the new office. ST presence Natália Leal. Presence of many travel agencies and Tour Operators of São Paulo.

CAMPAIGNING & ACTIVATION - Zermatt Digital Campaign – Key Partner Package

November

Digital campaign to promote Zermatt between Nov 3rd and Dec 3rd

Google and Meta Campaign:

- 49'314'89 impressions
- 127'572 clicks

KMM: Podcast on Health Tourism.

13 Nov

The Market Manager Fabien Clerc was invited to speak about health tourism in Switzerland on a medical podcast led by Dr. Gustavo Meirelles, a renown Brazilian radiologist and healthcare executive.

The weekly podcast called ExpertCast is broadcasted on Spotify and focuses on innovation in health.

The 1-hour podcast was recorded and will be broadcasted at the end of December.

Audience: medical aficionados.

KMM: Podcast on Switzerland Tourism.

29 Nov

The Market Manager Fabien Clerc was invited to speak about tourism in Switzerland on a renown podcast led by social media coach influencer Aline Bak

@alinebak Instagram

<https://www.linkedin.com/in/alinebak>

The weekly podcast called POD da BAK is broadcasted weekly on YouTube and covers multiple topics.

The full 1-hour podcast can be found here.

Audience: HNWIs, women mostly

KMM/CAMPAIGNING & ACTIVATION: Brand Luxury Activity - Winter Launch: On December 6th,



Switzerland Tourism gathered among 28 socialities to launch the Winter season. The event was a lunch hosted by Carlota restaurant with a menu including Swiss ingredients. The Omnia has sponsored this activity and Cailler also participated with chocolate bars. All the participants received our Christmas gift at the end.

KMM/CAMPAIGNING & ACTIVATION: Xmas Giveaways: Switzerland Tourism Brazil team delivered Xmas Giveaways including Lindt chocolate, hand-painted Christmas ornament and customized festive season message to 40 main influencer and key partners in São Paulo.

KMM CAMPAIGNING & ACTIVATION: Destination Wedding Constance Zahn

Banner online on Constance Zahn website.

Constance Zahn is the best destination wedding media in Brazil

Campaign for 3 months

Page views: 1.2MIO/ month

Link MySwitzerland.com

CAMPAIGNING & ACTIVATION

Swiss Travel System Digital Campaign – Key Partner Package

Digital campaign to promote the Swiss Travel System between Oct 25th and Dec 22nd

Google, Meta and Youtube Campaign:

- 41'524'86 impressions

- 514'56 clicks

KAM

KAM/Digital Luxury Newsletter: Gstaad Palace. Sending Dates: Dec 07th and 18th. Database: 700 mails for luxury travel agents. Opening rate: 82.88%. Newsletter link: <http://smtp.mailnewsdobrasil.com.br/email/SUICA-21-DE-24-2023/suica-21-de-24-2023.html> Key partners highlighted in the content: Gstaad Palace.

KAM/Digital Luxury Newsletter: The Dolder Grand. Sending Dates: Dec 12th and 20th. Database: 700 mails for luxury travel agents. Opening rate: 79.10% Newsletter link: <http://smtp.mailnewsdobrasil.com.br/email/SUICA-23-DE-24-2023/suica-23-de-24-2023.html> Key partners highlighted in the content: The Dolder Grand.

KAM: Training Seminar – Perfect Trip (Virtuoso)

13 December 2023. Dedicated training seminar to Perfect Trip team. Goal: overview of the destination, Swiss Travel System, winter updates. Audience: 12 trade professionals (sales, operations, and product teams). Switzerland Tourism presence: Mara Pessoa, Trade Manager.

KAM: Webinars – Teresa Perez. Audience: 40-50 Teresa Perez sales, operations, and product teams; Switzerland Tourism presence: Mara Pessoa, Trade Manager.

1. 07 Dec 2023: Lucerne, Mt Pilatus, Lake Lucerne Navigation

Key partners: Manuela Casanova, Lucerne Tourism; Meret Geissbühler, Lake Lucerne Navigation



Company; Anita, Mt Pilatus.

2. 14 Dec 2023: Made in Bern (Jungfrau Region & Interlaken Tourism)

Key partners: Elena Koch, Jungfrau Region; Julia Steiger, Interlaken Tourism.

3. 19 Dec 2023: Crans Montana Tourism

Key partners: Pierre-Henri Mainetti, Crans Montana Tourisme & Congres; Crans Ambassador; Guarda Golf Hotel & Residences; LeCrans.

KAM/KMM: Travel Luxury Magazine by Primetour – 3rd edition

Breakfast event at DANGaleria (Art Gallery). ST Brazil attended the launch event of the new edition of the Travel Luxury Magazine by Primetour published in partnership with the biggest trade media publication Panrotas. Double page editorial focused on 'How to Winter' Campaign. Switzerland Tourism team presence: Mara Pessoa, Trade Manager.

KMM

KAM/KMM: LUXURY TRAVEL & EXPERIENCES by PRIMETOURLuxury December 2023. Printed and digital magazine; Double page article; 4500 copies; B2C audience: Primetour's VIP clientes database, American Express & VISA Aeternum clients database; B2B audience: 3000 travel agencies, 60 Independent consultants; Distribution channels: Private jet lounges, art galleries & luxury malls, luxury brands & charity events; Content topic: 'How to Winter' Campaign. Coverage: Valais, Gstaad Palace, Gstaad, Matterhorn-Zermatt, Badrutt's Palace Hotel, St Moritz, W Verbier, and Tschuggen Grand Hotel.

KMM

Media Trip: Xmas Market

Media trip to cover the Xmas Market and Winter Season

@byfabigama: 553K followers on Instagram

@monicasalgado: 678K followers on Instagram

@flaviapiresexplora: 51.9K followers on Instagram

Focus of this trip: Xmas Market and 5 stars hotels (project in partnership with the Leading Hotels of the World)

ST support: 1 Swiss Travel Pass, accommodation, flight tickets, programme and meals

KMM/CAMPAIGNING & ACTIVATION: Health Mission

December 2023

Branded content on Radio Antena 1 with CTA for the website switzerland.com/health Radio Antena 1 has a well-segmented audience of high interest for the Brazilian luxury niche. We had 45 radio broadcasts covering 152 cities in São Paulo



Future Activities

STM Winter 2024, Villars: Jan 12-18

ST LX Luxury Winter Famtrip 2024, Zurich, St Moritz, Vals: Jan 20-26

Sete Mares Ski Famtrip 2024, Crans Montana, Gstaad, Zurich: Jan 21-28



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 %
- ON statistics October 2023/2022: -5%; ON statistics October 2023/2019: -5,8%
- Gross domestic product -0,8% in 3rd quarter of 2023
- Consumer price index +7,3% in November 2023
- Inflation rate +11,4% in November 2023
- Industrial production -2,7% in November 2023
- Construction production -6,5% in November 2023
- Average gross wages and salaries (nominal) in 3rd quarter of 2023 was +7,1%
- Average gross wages and salaries (real) in 3rd quarter of 2023 was -0,8%
- International export in November 2023 -2,6%
- International import in November 2023 -15,4%
- General unemployment rate in October 2023 was 3,0%
- Exchange rate 1,- CHF = 26,30 CZK (8.1.2024); 25,60 CZK on 2. 1. 2023; 23,92 on 5. 5. 2023

Campaigning & Activation

- 2.11.–14.12. – Winter e-promo package in form of 4 articles incl. e-newsletter promo by magazine SNOW and its website SNOW.cz for Aletsch Arena (2.11.), Lake Lucerne Region (9.11.), Schilthorn and Jungfrau (23.11.) and ESSVM (14.12) – always presenting news and winter active vacation possibilities
- 6.11. – RhB graubündenPass promo as a tip for Christmas gift in special Christmas promo page of magazine Lui and int website lui.cz
- 6.11. – on-line advertorial “Swiss Alps in full glory with graubündenPass” placed at one of the biggest newspaper websites in the market with presentation of graubündenPass ticket and its possibilities with RhB (BEX, GEX, regional trains, Davos Klosters, Engadin Scuol, Diavolezza, Poschiavo)
- 11.–12.11. – Festival Obzory – ST stand and presentation at biggest travel festival focused on outdoor and active vacation in the Czech Republic (2.700 visitors)
- 20.11. – on-line advertorial “Experience magic of winter in the Switzerland” placed at one of the biggest newspaper websites in the market with presentation of Davos Klosters, Saas-Fee, Engadin Scuol, Zermatt Bergbahnen, Aletsch Arena, Rigi, and Premium panoramic trains)



- 21.11. – on-line advertorial “Experience Swiss Alps in its fully beauty placed at lifestyle and ladies website iGlanc.cz with focus on graubündenPass, RhB, GEX and BEX

- 27.11. – e-contest at Denik.cz (one of the biggest newspaper websites in the market) with PR article “Winter with Swiss trains” presenting RhB, BEX and GEX. Winners of the contest get Swiss gift package (SWISSmag subscribers, collection of printed guides and small give-aways)

- 6.12. – ST B2C e-Newsletter 12/2023 for December 2023 with promotion of accommodation packages in Davos Klosters, Jungfrau Ski Pass, Glacier Panorama Tour 2.0 in Aletsch Arena, Engadin open ski sledging, Trübsee Snow Park, wellness in cheese dairy by Rigi, Cheese boat trips by SGV, Fondue and sledging package by Schilthorn, Pilatus fondue gondola, Flexi ski pass in Zermatt, and graubündenPass by RhB. On-line banner for Lucerne Tourism and photo of the month from Aletsch Arena

- 16.12. – on-line advertorial at premium social magazine Estate on its website estate.cz with promotion focused on exclusive and most calm & relaxed winter active vacation in Aletsch Arena

KAM

- 11.12. – Sending out thank you letter with seed paper as a gift to VIP trade and media partners in CZ

- 14.12. – Christmas meeting in office – day of open door in our office and networking with our VIP trade and media contacts

KMM

- October / December - 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

- 1.11. – 1/1 RhB winter advertorial in on-board magazine MyWings of airline SmartWings for Winter season (November 2023 – January 2024)

- 2.11. – 4/1 winter advertorial placed in high-end luxury travel magazine Luxury Travel Digest with promotion of GTToS, Lili Festival in Lucerne, Jungfrau Ski Pass, spa with Rigi, ski at Schilthorn, RhB Magic Express, e-scooters at Titlis, overnight in Radisson Blu Andermatt, HC Pardubice at Spengler Cup in Davos

- 2.11. – 4/1 advertorial in magazine SNOW 147 (most important and biggest print magazine with focus on winter active vacation in the market) with presentation of winter active vacation possibilities with Lucerne, SGV and Engelberg Titlis

- 9.11. – winter magazine Switzerland as a supplement in premium winter sport magazine Premium Ski to its subscribers

- 9.11. – 4/1 advertorial “News from Switzerland for Winter season2023/2024” placed in premium winter sport magazine Premium Ski with presentation of Davos Klosters, RhB, ESSVM, Lucerne, Rigi, SGV, Titlis, Engelberg, Radisson Blu Andermatt, Schilthorn, JFB, Aletsch Arena, Zermatt, Zermatt Bergbahnen

- 10.11. – 6/1 advertorial in premium travel magazine Travel Life with 2/1 winter promo of Davos Klosters and 4/1 winter promo of ESSVM



- 14.11. – 2/1 advertorial “Magic of the winter in Switzerland” placed in supplement magazine Winter holiday by Hospodarske noviny with promotion of Davos Klosters, Engadin Scuol Samnaun, Zermatt Bergbahnen, Aletsch Arena, Rigi, JFB, and Swiss panoramic trains
- 16.11. – 4/1 advertorial in magazine SNOW 148 (most important and biggest print magazine with focus on winter active vacation in the market) with presentation of winter active vacation possibilities with Schilthorn and Jungfraubahnen
- 28.11. - 2/1 advertorial in ladies fitness magazine Kondice focused on GTToS, Lucerne City, Aletsch Arena, Rigi, SGV, Schilthorn, Zermatt Bergbahnen, Nendaz and Les Paccots
- 1.12. – 2/1 advertorial in social and lifestyle magazine Epoque focused on Swiss gourmet specialities and traditions (Swiss Cheese Marketing, Gstaad, Swiss Wine Promotion, Wallis, Ticino, Vaud, Lake Lucerne Region with Fassbind)
- 1.12. – 1/1 RhB AD in printed Czech train timetable by website Zdopravy.cz
- 3.–8.12. – CZ participation at Intl. media trip Winter Magic (1 PAX)
- 5.12. – 6/1 advertorial for Summer, Winter and Swisstainable offers placed in yearbook of Alpenverein in the Czech market with integration of al Czech market partners
- 7.12. – 4/1 advertorial in magazine SNOW 149 (most important and biggest print magazine with focus on winter active vacation in the market) with presentation of winter active vacation possibilities in Engadin Scuol Samnaun Val Müstair
- 18.12. – 2/1 advertorial in magazine Premium Guide with presentation of Davos Klosters, RhB, Lucerne, Rigi, Engelberg – Titlis, Radisson Blu Andermatt, Schilthorn, ESSVM

Future Activities

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



2. Active Markets

INDIA

Market Situation

- Latest overnight figures of October show just a 3% reduction in overnights as compared to 2019. This could be due to better hotel availability in places like Zurich, Lucerne and Interlaken.
- The trend of Indians traveling throughout the year continues into the months of November and December too.
- Estimates for 2024 look promising as TO's hope that with the ease of the Schengen visa situation in 2024, group numbers will return as well.
- National elections which are held every 5 years, are due in 2024. Usual timing is end April and May which can impact holiday travel as less travel happens during the elections. Dates are still awaited.

Campaigning & Activation

- **Winter Influencer Trip with 5 content creators** to showcase winter activities in and around Lucerne with a pretrip to Zurich and a post trip to Schilthorn.

The focus was to present our partners as a good destination for a winter trip

- Each content creator was supposed to put up 3 to 4 stories daily as well as one multiimage post or a reel for each day as well as content for STS and SWISS. Due to Christmas and new year, when there is less traction on the handles, the content is going to be shared in Jan - reporting and actual numbers to follow in Jan 24

- **Digital and social media campaign with STS** to promote Swiss trains in winter from mid Dec to mid Jan. Campaign online at the moment

- **A series of 4 Advertorials** for Lucerne and its partners were done in CNTraveller, Travel + Leisure, Vistara magazine as well as India today Spice.

Total Circulation: **468'000**

Total contacts: **2.35M**

KAM

KAM Leisure:

- 2nd Nov 2023: Destination training for the travel trade in Bhubaneswar. Presenters included ST, STS, Rail Europe, Zermatt Bergbahnen, Titlis Cableways (Video walk-through) and RhB. Total attendees = 26

- 7th Nov 2023: Destination training for the travel trade in Rajkot. Presenters included ST, STS, Rail Europe, SWISS, Zurich Tourism (Virtual), Titlis Cableways (Video walk-through), Zermatt Bergbahnen, and BLS Interlaken. Total No. of attendees = 35



- 27th Nov - 1st Dec 2023: Switzerland Travel Experience (STE) 2023, our marquee event for the travel trade in the market. 21 Swiss suppliers travelled to India to meet / interact / network with the travel trade across 3 cities (Mumbai, Delhi & Chennai). The event comprised of Roadshows in Mumbai and Delhi, and a VIP Event with Key buyers in Chennai. Total No. of attendees = 628

SCIB:

- Sales call in Chennai in November
- Attendance at IBTM in Barcelona
- Corporate Study trip from 6th to 11th December - total 11 pax
- Corporate sales visit to Kolkata in December
- Networking with corporate clients in December

KMM

- Sent one journalist to the international media trip - Winter advent
- **TV Trip with 2 top celebrity actresses** with ABP news focusing on Swiss winters in cities especially Zurich from 10th to 14th Dec. The two actresses (with approx 6 M followers on Instagram also had to post content on their individual handles as well as on the social handles of the TV channel.

Their trip pictures were amplified by us and also got organic media coverage about the 2 actresses in Switzerland.

Total contacts on TV channel, 2 episodes including their YouTube handle - **7.2M**

Total contacts from coverage on the trip on other publishers - **80M**

- **Switzerland won the favorite overseas destination in the annual readers awards run by Conde Nats Traveller India**

- **Switzerland also won the top international destination in the annual awards from Travel +Leisure India and southAsia.**

Future Activities

KAM Leisure:

- 12th - 18th Jan 2024: STM Winter 2024 in Villars. 5 keyaccounts from India get an opportunity to interact / network with 120+ Swiss winter suppliers
- ST India Destination trainings - 2 cities (Tentative)
- ST India Webinar Series - Visa Webinar (Tentative)
- Sales Calls in Delhi in Feb 2024

SCIB:

- MICE Travel Mart for Corporate clients in Delhi, 12th January & Sales call
- Travel Mice & Corporate show in Jaipur, 20th & 21st January & sales call
- Sales call in Chennai & Hyderabad in February.

Campaigning & Activation:

- Winter shoot with Indian friendship ambassador Neeraj Chopra in Lucerne, Engelberg and Interlaken

Switzerland Tourism.



from 16th to 23rd Jan

- Neeraj Chopra multimedia campaign including print, digital and OOH from Feb to Mar 2024
- STS digital campaign in March 2024



2. Active Markets

JAPAN

Market Situation

Flights are still a challenge (capacity)

Yen is still on a all-time-low

Travel trade are positive for next year and current bookings are giving positive signs

Over proportion recovery of the STP sales

Luxury segment is recovering the best

Campaigning & Activation

04.11 - 05.11 - Sustainable event "Green Challenge Days" in Tokyo

08.11 - 10.11 - GTToS and Swisstainable presentation at Mass Trans EXPO

20.11 - 19.12 - Advertorial articles Rakuten Infoseek

27.11 - 03.12 - Rakuten Travel Top page banner/Display Ad

30.11 - Sustainable Talk Show in Aoyama, Tokyo

30.11 - Special Heidi Magazine release

09.12 - 10.12 - Stand at Christmas Market in Chiba

13.12 - 20.12 - Display Ads on Allabout

14.11 - 18.12 - Advertorial article on Travelco

15.12 - 15.01.2024 - Advertorial article and booster Ads on Lets Enjoy Tokyo

November/December - Special articles series about sustainable trips on Brutus webmagazine

27.12 - 09.01.2024 - Heidi Anime 50th Anniversary exhibition in Osaka

KAM

14.11.2023 - JATA destination webinar for the theme 'Adventure Travel'.

8.12.2023 - Welcome Event Paolo Lunardi at Swiss Residence

01 - 31.12.2023 - JATA photo posting campaign



KMM

Media Trip

- Zurich & Jungfrau Railway Group winter media trip focusing by inviting 7 journalists.

Media Newsletter

Quartely media newsletter delivered on 22 Dec. to 691 media recipients.

Media Result

TV:

- Asahi TV 'Tabi Salad' Swiss Special vol.3 featuring Interlaken, Brienz and Jungfrauoch.
- Asahi TV 'Tabi Salad' Swiss Special vol.4 featuring St. Moritz and Bernina Express.
- Asahi TV 'Tabi Salad' Swiss Special vol.5 featuring Glacier Express and Zermatt.

Radio:

- Yamagata Broadcasting 'Life is...', an interview to Masayo Oshio, ST Japan for the winter attractiveness, STToS and swisstainable incl. Kawaii campaign.

Magazine:

- 'Skyward' JAL in-flight magazine to introduce Alpine Crossing in Zermatt.
- 'Tabi to Tetsudo' train magazine to feature Matterhorn Gotthard Bahn and Aletsch Arena.
- 'Kankyo Business' magazine to feature Aletsch glacier and Swisstainable.
- 'Safari' men's magazine to feature Budrutt Palace and Kulm Hotel St. Moritz as the top winter resort hotels.

Online:

- 'Esquire.com' to introduce Six Senses hotel in Crans Montana.
- 'Cyclowired' to feature special article about 100% Women by cycling influencer Shino.

Newspaper:

- 'Mutsu Shimpō', series of 5 articles about Jungfrauoch, Wengen, Gotthard, GTToS and Lucerne as the result of Int. media trip STS Swisstainable and Swiss history.
- 'Kushiro Shimbun', the same as above.
- 'Shimane Nichinichi Shimbun', the same as above.

Future Activities

14 - 18.01.2024 - STMS (2 buyers)

06.02.2024 - Event by Swiss Embassy for 160th Anniversary of bilateral relations Japan/Switzerland

Switzerland Tourism.



15.02.2024 - Event with High-end TO JTB (b2c clients)
01.2024 - Heidi 50th anniversary campaign (continuation)



2. Active Markets

KOREA

Market Situation

Consumer Sentiment Index (CCSI) rose to 99.5 points in December of 2023 from 97.2 in a month earlier. It ended four consecutive months of decline in consumer confidence due to moderating inflation, a recovery in exports and hopes for an end to rate hikes. This has also influenced the travel sentiments through the steep increase of short haul travel extending to long haul travel early bird reservations.

STP remains the most attractive sales product in Switzerland also expanding the targets to higher age levels and family travelers.

According to Consumer insights' survey of 2023 Switzerland has the highest satisfaction rate of all travel destinations.

The future concerns related to the steeply rising currency exchange rates which will influence the selection of future travel destinations.

Campaigning & Activation

Title: 2023 Christmas event.

Period: 27 Nov – 1 Dec

Exposure: Schilthorn, Valais

Like : 2,342

Comment : 1,888

Total Engagement : 4,514

Total Imression : 67,916

Total E.R : 11.61%

Title: Web Award Korea 2023

Date: 14 Dec. 2023

Org.: KIPFA (Korea Internet Professional Association)

Category: Overseas Tourism Sector

Swiss Contents Hub : <https://swisshub.myswitzerland.com/>

Rated as the most innovated and best internet service

KAM



Title: Sales Calls Korea

Period: 14-15 Nov. 2023

Participants: 14 KAs, 12 Swiss partners

Place: Hotel Parnas in Jeju Island

Program

- 14th Nov / Hotel Parnas
- One-to-One meeting with key accounts
- 15th Nov. / Outdoor activity
- Mediation program of 'Earthing'
- Mandarin picking in small groups
- Kahoot quiz competition

KMM

Monthly press release to 700 journalists in Nov & Dec respectively

Major Results:

- Internet Hankook: Christmas Markets (Nov 14)
- KTX magazine: Theme Routes: Kambly Train (Nov 1)
- Outdoor: Christmas Markets (Dec 1)
- CEO&: Afternoon Tea Hotels (Dec 15)

Future Activities

Winter Influecer trip to Switzerland

Perid: 20 Jan. - 28 Jan. 2024



2. Active Markets

NORDICS

Market Situation

In general, the Nordic countries (Sweden, Denmark, Norway and Finland) are characterized by impressive political stability and economic strength. However, 2023 was a difficult year overall, riddled with economic and political challenges, although the various Nordic countries had varying degrees of economic success. In general, high inflation and sharp currency losses against the franc and also the dollar have taken a toll on consumers in all Nordic countries - expensive consumer spending, including holidays, has been and is being postponed to some extent. Sweden, as the largest Nordic country and an important pacesetter, will be in a slight recession at the end of 2023. At the moment, however, inflation is coming down strongly in all Nordic countries and the large exchange rate losses also appear to have slow-downed. According to Oxford Economics, all Nordic countries will return to slight growth in 2024. Politically, the Nordic countries are strongly influenced by the Russian war of aggression in Ukraine and the associated desire of governments and the population to join NATO. This has already become a fact in Finland in 2023, while the entry of Sweden, is very much delayed by Turkey and Hungary. The war in Ukraine also means significantly higher budgets for defense, a budget that is presumably missing elsewhere and puts additional strain on the strength of the currencies.

Campaigning & Activation

SCIB

Bucketlist Native 290.000 readers

KAM

20-31/12/2023

SoMe Campaigning in cooperation with Active Ski

Impressions: 1'094'499

Reach: 396'453

Clicks: 9'320

Newsletter Stand Alone, Active Ski

Recipients: 33,000

DK - TV2 Morning Show

24/12/2023

Cooperation with Grøn Rejs in DK for a competition on TV2 Morning Show.

Spot STS was shown (Gothard Panorama Express). We offered a prize for a competition and the winner won a train trip to Ticino, Lucerne & Jungfrau.

Reach: 290'000



Participants competition: 12'387

KAM

STHLM Days 23-24NOV, 3 events, VIP-workshop, Aprei-Ski, Crea-workshop with the Nordic wintercommunity 100 guests (trade, mice, media, content producers, etd.) 12 Swiss partners

Winter Newsletter

Sent: 10/11/2023

Recipients: 525

Opening rate: 39,4

Valais Winter Newsletter

Sent: 16/11/2023

Recipients: 516

Opening Rate: 39,2

FAMtrip with SkiUnlimited

14-17/12 - Engelberg, Lucerne & Andermatt

Ski Unlimited Kick-off, 10 pax

SCIB Famtrip Davos Zurich 7 pax

Travelnews B2B tradefair 9NOV in Stockholm, 4 CH partner. 5000 contacts.

KMM

2/12-8/12 Marko T Wramen - Basel

3/12-8/12 Charlotte Mielko - Intl media trip Christmas Markets

10-13/12 Peak Performance Athlete summit Zermatt

15-17/12 Adam Falk Engelberg

Future Activities

Stay longer, delve deeper campaign in the whole network of SL (Stockholm urban traffic). 4000 ads for 2 weeks mid January. Contacts around 15Mio
Winter STM in Villars with 10 Nordic Buyers. Pre-Fam to Saas Fee.



2. Active Markets

POLAND

Market Situation

Politics

Donald Tusk, former Polish Prime Minister and former President of the EU council in Brussels, who went into the Polish Parliamentary elections in October as the opposition leader, was able to form a new majority government in December. This came after the right wing PiS party under their leader Jarosław Kaczyński, who clearly lost the election but still came out as the strongest single party, unsuccessfully tried to form a government. Tusk, again as Prime Minister, is now leading a coalition of three groups: the moderate to liberal Civic coalition, the centrist "Poland 2050" formation and a union of left-wing parties. They had already a detailed coalition agreement ready by the time the Polish President finally gave Tusk the green light to form his government.

Until now, the new coalition has shown discipline during Parliamentary votes. The leadership of state owned TV and Radio stations as well as the Polish News Agency PAP has been let go. During the eight year PiS regime they had been infamous for spreading extreme pro-government propaganda. Tusk promised a return to balanced journalism.

Economy

The new Prime Minister Tusk attended the December EU summit in Brussels right after being elected. He was warmly greeted by most European allies. After announcing to roll back the controversial reforms to the Justice system, realized by the PiS majority in recent years, Brussels immediately agreed to pay out 5 Billion EUR of structural EU aid for Poland. The money had been "frozen" because the EU deemed the Justice reforms "undemocratic" and not according to EU law. More funds are going to be made available for Poland in the coming weeks and months.

Inflation stood at 6,6% year to year in November, the same as it was in October, but down from 10,8% in July.

The unemployment rate was declared to be 5,0% in November year to year, while the average employment stood still (-0,2% y/y) and average wages shot up by 11,8% to 7670 PLN (1670 CHF), further closing the gap with Western European countries. The numbers are being calculated for all Polish companies with 10 employees or more.

The Polish currency, the Złoty, has gained ground after the election in October, standing at ca. 4,60 PLN per CHF, after reaching even 5 PLN/1CHF in the course of 2023.

Campaigning & Activation

- ST Digital campaign, mobile and desktop creations

In image campaign using pictures and video

One month, November

390'000 views

- eGuide GToS promotion



Display on *wyborcza.pl*

Creations promoting our eGuide download

Second wave, beginning of November

Reach: 2'120'000

3'700 clicks

- ST wall calendar

Focus on Swiss autumn, sunrises and sunsets

Pictures of PL photographers visiting Switzerland

1'700 copies

Distributed among partners, KAM/KMM individuals, Swiss embassy

Used by photographers as a prize for their insta followers

- Embassy fence winter exhibition

From November 20th

Swiss map presenting regions & destinations

17 posters of winter activities and winter offers

QR codes with link to MyS

MyS winter page promoted

- ST Digital campaign, mobile and desktop creations

Display, rich media, banners, video

6 weeks campaign

Mailing to 45'000 recipients

Planned reach 4'950'000

- Monthly campaign with *Snowtrex*

Winter offers

SoMe activities (IG, TikTok, LinkedIn)

Newsletter

Online Branding

Contest for *Snowtrex* audience

Final results in December

Opening of the autumn photo exhibition, December 19th



Rzeszów, southern Poland, 150 participants
Photos of Swiss Autumn taken while exploring Switzerland
Presentation with focus on great photo spots in Switzerland
ST materials and calendars distributed among visitors
Exhibition open until February 20
- FB posts for our partners
Zermatt, Schilthorn, RhB
Ongoing, results in December
Winter posts promoted
How to..?
Link to MyS / winter
Posts reach so far around 340'000
Paid campaign for partners
Engelberg Titilis, Schilthorn, Zermatt, RhB, Aletsch Arena
Reach around 400'000 per post

KAM

- Winter Meeting at the Swiss Embassz,
21 November, 14 participants
Exchange with trade representatives
Presentation by Simon Bosshart, ST strategy and winter ideas followed by winter presentation
Partner news – Davos Klosters, Zermatt, Pilatus, Engelberg Titilis, Nendaz, RhB, Aletsch Arena, Schilthorn, SWISS
Raclette served by Swiss ambassador
Swiss chocolate, Swiss wine
- Snowee Raclette Party, TO selling winter packages to Switzerland
One day event in Wroclaw, October 1st
About 200 participants
Promoted via SoMe and website
Supported by mailing (1570 recipients and 47,15 % Open Rate)



ST promo materials used (brochures)

Online reach 321'000

- Campaign by Bissole, tour operator from Wroclaw

Focus on RhB offers

August – November

Google Ads, SoMe, YT, articles

Event with British&American Embassies in Wroclaw, 150 participants

970'000 contacts

Over 500 STPs sold (over 100% more than '22)

Over 450 overnights

Event in Wroclaw - New Year meeting, December 12th

Presence of the tour operator Bissole with Swiss offer

Swiss Travel Pass voucher as a prize

300 participants

ST materials, calendars distributed

- Trainings for agents of Snowtrex

Multiagents *Wakacje.pl* and *Travelplanet.pl* selling skiing offers

Presentation about Switzerland and dedicated offers

85 participants total (in person and online)

ST winter materials distributed

- Fam trip winter in Engelberg, 5 pax, December, Tour operators with winter products, December 10. - 13., Site inspection, exploring skiing possibilities, infrastructure and facilities, SoMe activities by participants

KMM

- Winter Meeting at the Swiss embassy. November 21st, 17 participants

Presentation by Simon Bosshart, ST strategy and winter ideas followed by ST winter presentation

Partner news – Aletsch Arena, Davos Klosters, Engelberg Titilis, Pilatus, Nendaz, Schilthorn, Zermatt, RhB

Raclette served by Swiss ambassador

Swiss chocolate, Swiss wine



- Mini Int. Media Trip, Christmas markets, December 3.- 8., 1 pax from Poland, portal *natemat.pl*

Future Activities

STM Winter edition, 7 pax, 12-18 January
Winter photo trip, 6 pax, January
Joint Promotion Agreements with TO's
Influencer trip, winter activities, March
SoMe activities for partners, Feb & March
Fam Trips to Davos Klosters and Nendaz



2. Active Markets

SOUTH EAST ASIA

Market Situation

STS - sales of STS product has grown tremendously for Jan-Sep 2023 vs same period in 2019:

- Thailand: +136%
- Singapore: +243%
- Malaysia: +246%
- Indonesia: +343%
- Philippines: +667%

Best practice competitors

The 1st High Speed Train in SEA is commercially launched in mid Oct, and has since carried >350k commuters between JKT-BDG. This also increases public awareness of comfort, convenience, affordability and safety of High Speed Train travel.

Alipay+ China launched cross-border payment in collaboration with local payment and digital wallet partners in PH, TH, MY.

Tourism New Zealand has developed Halal food guide in partnership with Federation of Islamic Associations of NZ and Kiwi Muslim Directory.

Singapore Tourism and Klook jointly invest >2mio SGD to drive marketing initiatives.

Japan will issue e-visas to VN tour groups with 5 working days from 1Nov. This speeds up visa issuance and drive more travel demand to Japan.

Campaigning & Activation

STS - KKDay Winter campaign Nov - Dec to promote STP and GTToS

STS - 5 digital Billboards in KUL & PEN 20Nov-19Dec

MY - Sponsorship with MuzArts on the Launch of 'A Journey To Switzerland' where MuzArt students are invited to create their Swiss dreams to life through the world of 3D art.



ID - DOOH & OOH: Winter GToS Bus Shelter & Digital Screens at Commercial and Condominium Apartments in Greater Jakarta Area from 15 Nov to 15 Dec.

SG - Winter Media Briefing at TRIFECTA Ski Arena where media invited to learn how to ski/snowboard. Also present at the event were **Mr. Maurus Lauber**, CEO of Swiss Travel System, and **Mr. Simon Bosshart**, Head of Markets at Switzerland Tourism.

TH - Public event - STCC 25th Anniversary Charity Cocktail, 30 Nov

TH - OOH: Swisustainable Bangkok Sky Trains, Inner & Outer Wraps & LED screens on stations, 01 Dec - 29 Feb

TH - VIP Networking dinner event, 04 Dec

KAM

STS - Market Development Tour + RE Salescalls 15-24Nov

STS - MICE Newsletter to Trade 1Nov

STS - Winter Newsletter to Trade 1Dec

STS - B2B Seminar with Kuoni Tumlare SG 1Nov

STS - Webinar with Miki Travel + SEA travel agents 6Nov

STS - CEO visit + salescalls BKK SIN 3-8 Dec

STS - RE Seminars with Miki Travel in JKT BKK 11-15Dec

SEA - Market Development Tour, MNL, KUL, JKT, SUB, 16-24 Nov

SEA - Fam Trip with the Leading Hotel of the World, 8-18 Nov

SEA - Trade webinar "We need to cool down, we need Switzerland"., 08 Nov, Partners: STS, Graubunden, St.Moritz

SEA - Trade webinar "We need Winter Know-How, we need Switzerland"., 06 Dec, Partners: Zurich, Lucerne, Davos

TH - Matterhorn region event, Bangkok, 3 Nov

TH - Graubunden & RHB Lunch gathering event, Bangkok, 29 Nov

SCIB TH - KAM gathering with Barbra Albrecht, 9-10 Nov

TH - ST & STS Sales visit, 03-05 Dec

KMM

STS - KOL 2.0 Winter Trip 8-15 Dec

STS - Advertorial write-up in IM First Class premium magazine featuring GEX Excellence Class and GPX Prestige Class



TH - Bangkok Post, 2 pages coverage, Circulation 1.2M+, Dec 2023

TH - GQ Thailand, 4 pages coverage, Circulation 3.3M+, Dec 2023

MY - GLAM Malaysia, 2 pages coverage, Circulation 54,000, Dec 2023

ID - Fortune Indonesia, 4 pages coverage, Circulation, 8,000, Dec 2023

Future Activities

STS - Salescalls with new STS colleague to BKK, MNL, SGN in Q1 2024

STS - B2B Seminars in BKK, MNL, CEB, SGN in Q1 2024

STS - Activate Changi Recommends to sell STP

STS - Activate Pelago (subsidiary of SIA) to sell STP

KAM SEA - STM Winter 2024, Villars, 5 SEA

KAM SEA - Post STM Winter, SEA Famtrip, 18-23 JAN, St.Moritz & Graubunden

KMM SEA - Winter media trip, 11-19 Jan, MY SG TH medias

KMM TH - The Bucket List TV media trip, 22 Jan-04 Feb

Interesting observations

STS - JR Group and distribution partners e.g. Klook, KKday begin to focus on point to point tickets. This follows the increase of up to 77% for their nationwide passes from 1Oct.

STS - Weakened SEA currency against USD/EUR/CHF obligates SEA travel agencies to properly hedge against currency exchange risk to remain profitable and price competitive.



2. Active Markets

SPAIN

Market Situation

Travel Behaviour

In the third quarter, residents in Spain made 60.6 million trips, 6.7% more than in the same period last year. In addition, total travel expenditure is 23,561 million euros, an increase of 12.1%, according to data from the Residents' Tourism Survey (Familitur) published by the National Statistics Institute (INE).

The main destination of 89% of the trips was the national territory, with an increase of 6.4% compared to the third quarter of last year. Foreign trips, which represent 11% of the total, increased by 9%.

Spain projection note OECD Economic Outlook November 2023

GDP is expected to grow by 1.4% in 2024 and 2.0% in 2025. Private consumption and investment growth will moderate in 2024 due to tight financial conditions and persistent inflation, before picking up in 2025. Inflation is forecast to rise slightly to 3.7% in 2024, before returning to 2.3% in 2025.

Campaigning & Activation

Zurich sales campaigns with Tourist Forum

TF is a tailor-made nationwide B2B and B2C travel agency and the Christmas product packages we have created were sold out. The collaboration included: Zurich as the destination of the month, highlighted on their website and SoMe. B2B and B2C dedicated emailing. Meta Ads, Google Discover and Youtube Ads Campaign.

Marketing contacts: 1'236'515

Zurich Xmas markets @ Viajar

We promoted the city in the Spanish top travel magazine through an interactive map where all Xmas markets were included. This map was promoted with: 3 Prescriptive articles with 30'000 PV's. A dedicated e-mailing to 21'345 emails. Highlighted section on Club Viajar. 3 posts on SoMe: FB 1.8M, IG 163k. Campaign's circuit of Prensa Ibérica.

Marketing contacts: 4 M of impressions

Zurich Xmas markets @ 20minutos.

Digital branded content with 19'000 page views at the travel division of 20Minutos VIAJES. The article was linked to a Tourist Forum bookable offer to push sales. Highlighted on 20Minutos home page for 2 days and reels on IG and FB.

Marketing contacts: 790'000

KAM



Winter B2B Webinar with CATAI Sámaras

Sámaras is a successful tribe where TA and TO's can be nourished with new travel destination knowledges. ST presented the participating partners campaign with a winter tour (ZH, BS, GE, LU, STS). We also promoted MySwitzerland Pro and the Switzerland Travel Academy

Marketing contacts: 275 attendees

KMM

Mediatrips

A small group of journalists traveled 24th to 27th November to the Christmas market in Basel and came back with a great coverage:

Program Miradas Viajeras in Capitol Radio with 90'000 listeners

Program Barcelonautes in Canal 4 with 300'000 viewers

Program Miradas Viajeras from Negocios TV in Movistar Platform with 150'000 viewers

Program Son 4 Días in RNE with 150'000 listeners

Top Coverage

Traveler.es: Qué ver en Lucerna, 400'000 online media contacts

Libertaddigital.es: Zúrich se transforma en lujo, 450'000 online media contacts

Barcelonautes TV: Barcelonautes en Mürren, 300'000 viewers

Autoclub RACE Magazine: Los Alpes suizos y James Bond, 500'000 online media contacts

Aquí la Tierra TVE Program, three different programs about Zurich's gastronomic diversity, 3'000'000 media contacts

Hola Magazine: Zúrich en constante reinvencción, 87'685 copies, 306'898 media contacts

Top Viajes Magazine: Tic-tac Zúrich, cultura, finanzas y bienestar, 150'000 online media contacts

Viajar Magazine: Suiza, refugio de invierno, 74'000 copies, 261'685 media contacts

La Vanguardia daily newspaper: El primer teleférico totalmente robotizado, 69'616 copies, 243'656 media contacts

La Vanguardia daily newspaper: Nueve recomendaciones de Marco Odermatt en Suiza, 69'616 copies, 243'656 media contacts

Barcelonautes TV: Mercado de Navidad de Basilea, 300'000 viewers

Miradas Viajeras Movistar TV: Mercados de Navidad en Basilea, 150'000 viewers

Q Travel Magazine: Lucerna, la ciudad más vibrante y moderna de Suiza, 71'000 online media contacts

Q Travel Magazine: Guía completa de los mercados de Navidad en Basilea, 71'000 online media contacts

Switzerland Tourism.



RNE Radio Program Som 4 dies: Els mercats de Nadal a Bailea, 150'000 listeners

Total media contacts: 6'597'895