

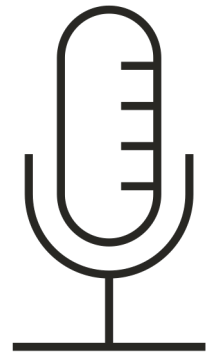
swi+zerland

Markets Development Webinar

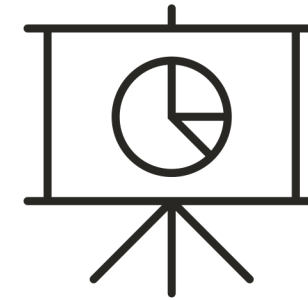
Brienz, Rothorn ©Jan Geerk

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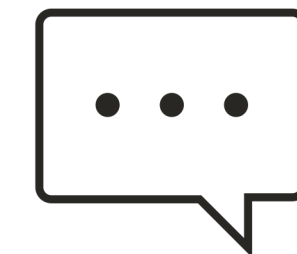
Key Partner Webinar, June 5, 2024
Corinne Genoud, Head of Markets West
Simon Bosshart, Head of Markets East



Webinar will be recorded



Recording & slides will be shared



Q & A session at the end

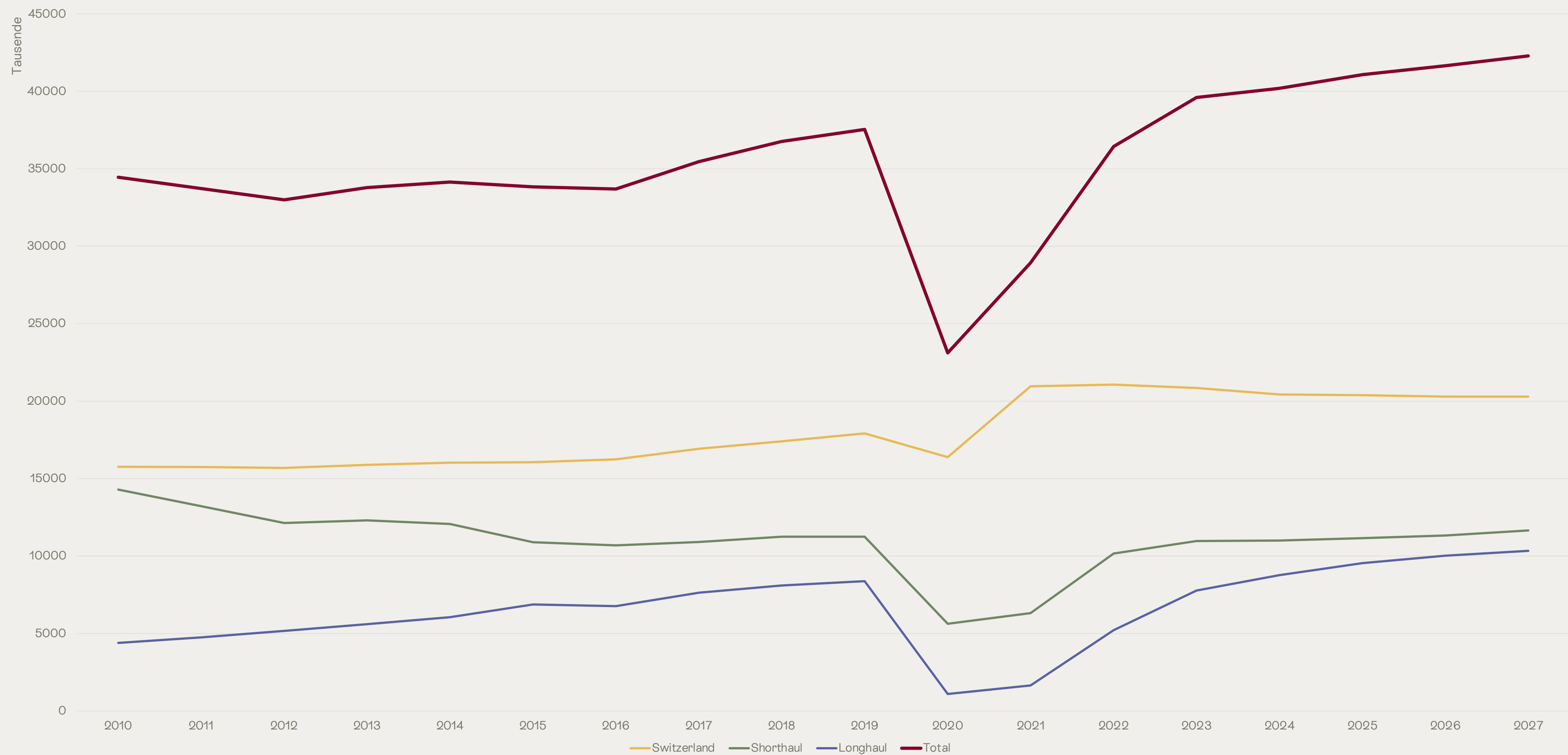
Agenda

1. **Markets Status and Outlook**
2. **Markets Intelligence for Swiss tourism partners**
3. **Markets Strategy**
4. **Markets Activities Agenda**
5. **Q&A**

Market Status and Outlook

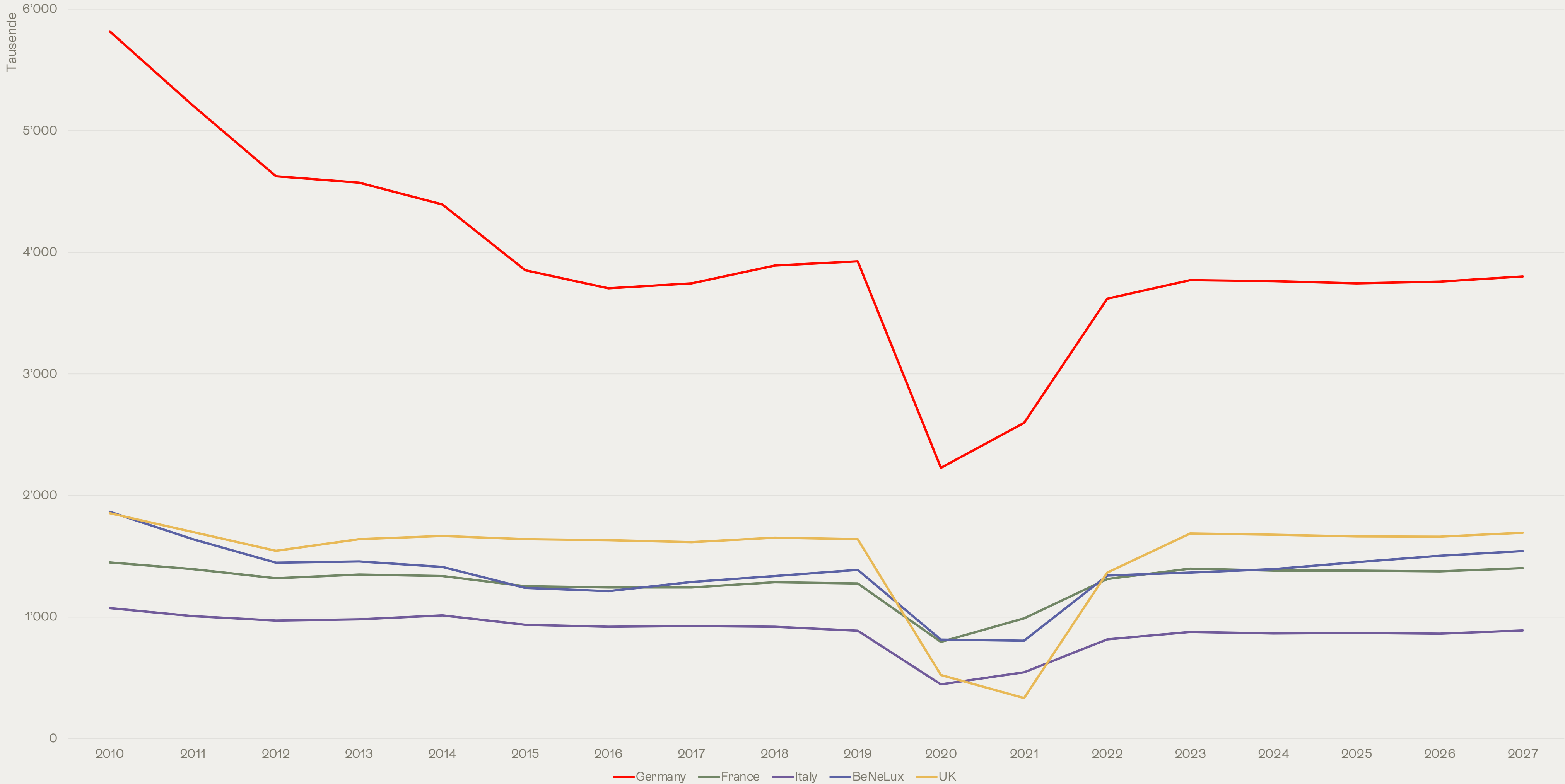
Global Overnights 2010 - 27

- In 2024, all market categories leave CoVid behind
- Switzerland settles on a higher level than pre-CoVid
- Europe stagnates
- Future growth comes from Overseas



Overnights, 2010-27, Europe

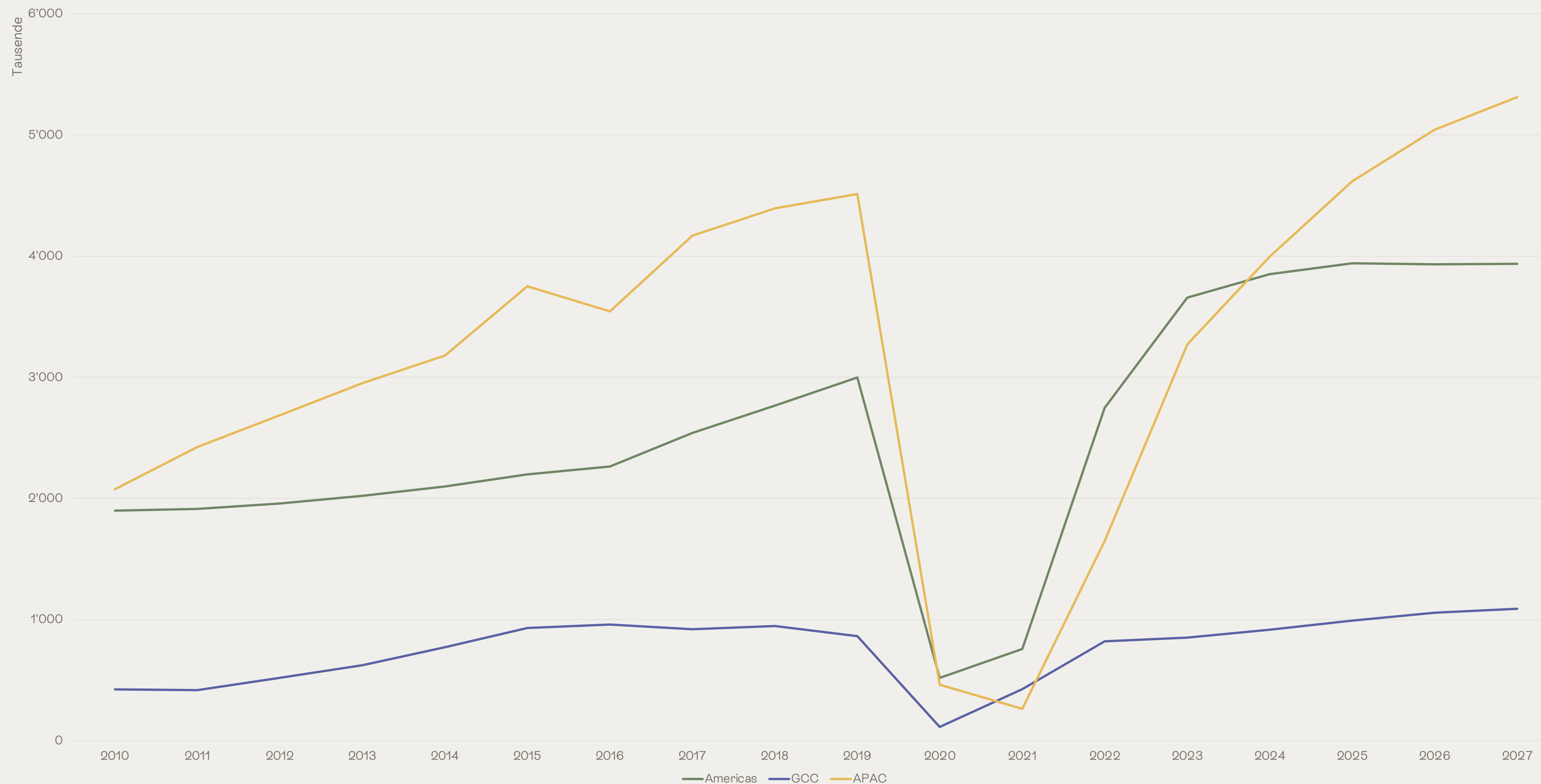
- Recovery in 24
- Far from historical heights
- No substantial upward turn in sight



Source: Oxford Economics, BAK, HESTA, Estimation ST (Status May 31, 2024)

Overnights, 2010-27, Overseas

- Americas in an all time high, with growth slowing down
- GCC quick to recover, moderate growth
- APAC gaining back its pre-CoVid power, leading growth in near future



Source: Oxford Economics, BAK, HESTA, Estimation ST (Status May 31, 2024)

Arrivals 2019 / 23

Europe vs Switzerland

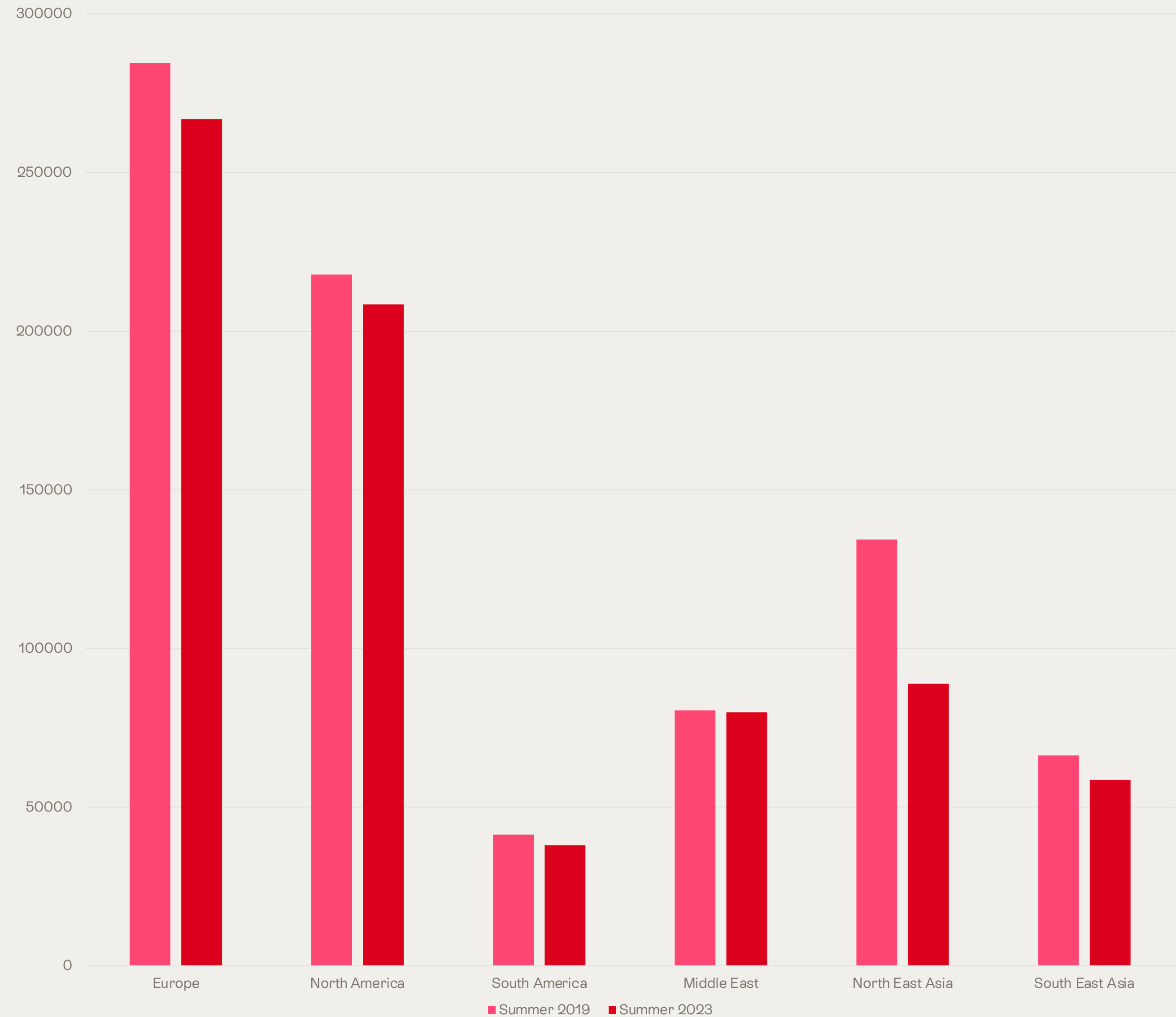
- Switzerland ...
- ... **recovers faster** than the European average
- ... has **gained market share** on the overall European inbound tourism



Source: Oxford Economics, (Status 12.2023)

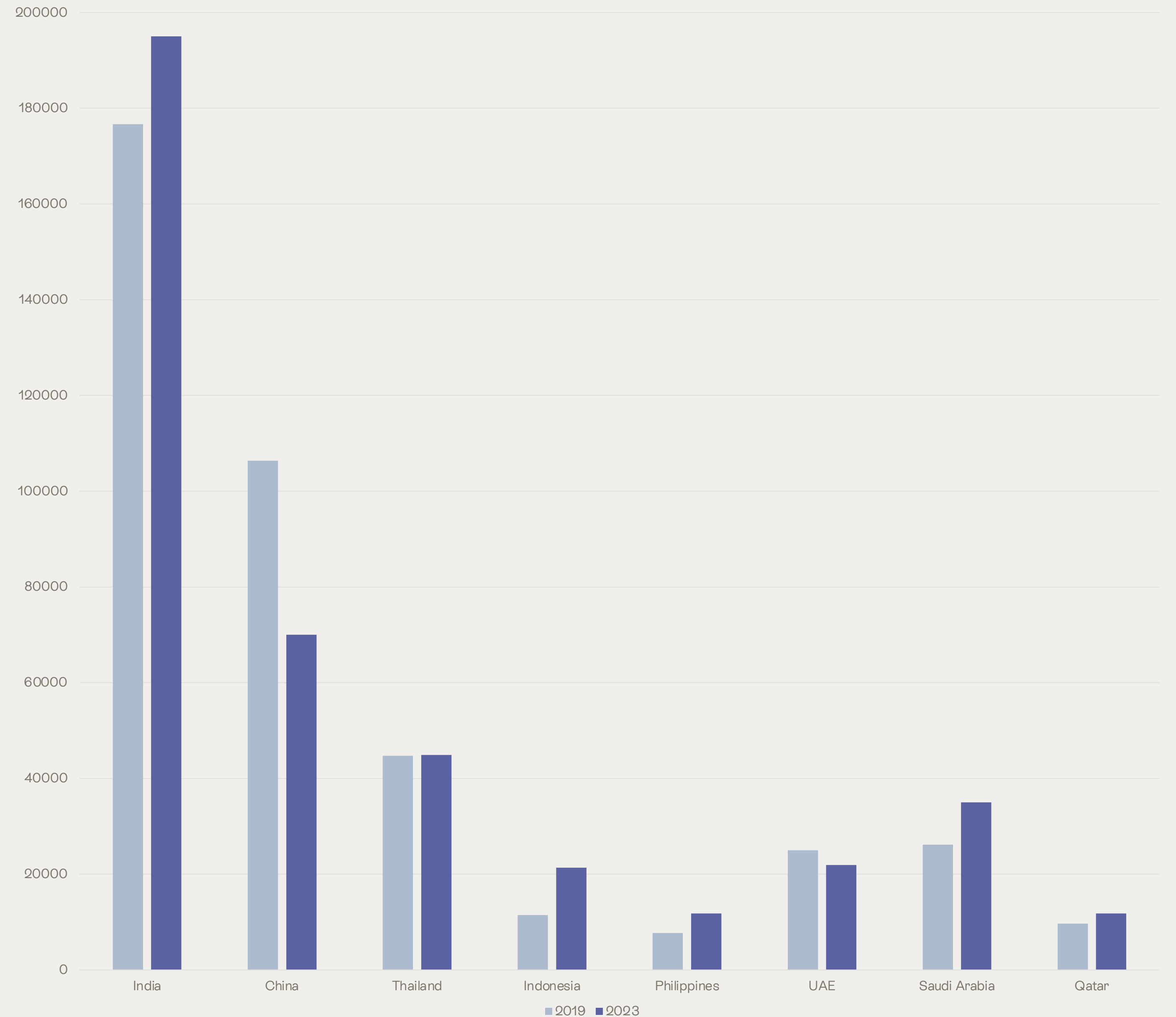
Global Flight Capacity 2019 / 23

- Nearly back to pre-pandemic levels
- North East Asia still lacking behind
- Late Recovery China
- Detours due to closed airspace over Russia



Swiss Visa Supply 2019 / 23

- Swiss Visa Capacity is back to pre-pandemic levels, or even higher
- Under capacity of other Schengen countries has increased the pressure on the Swiss visa sections, and leads to excessive visa shopping



EES and ETIAS

EES

Entry/Exit System

Only authoritative source: [Link](#)

- **Automated external border crossing system** to register **non Schengen nationals** for **short stay travels** (< 90d) to any Schengen country
- Data registration at 1st Schengen outer border crossing, data stored for 3 years
- Implementation: Oct 2024 (tbc)

ETIAS

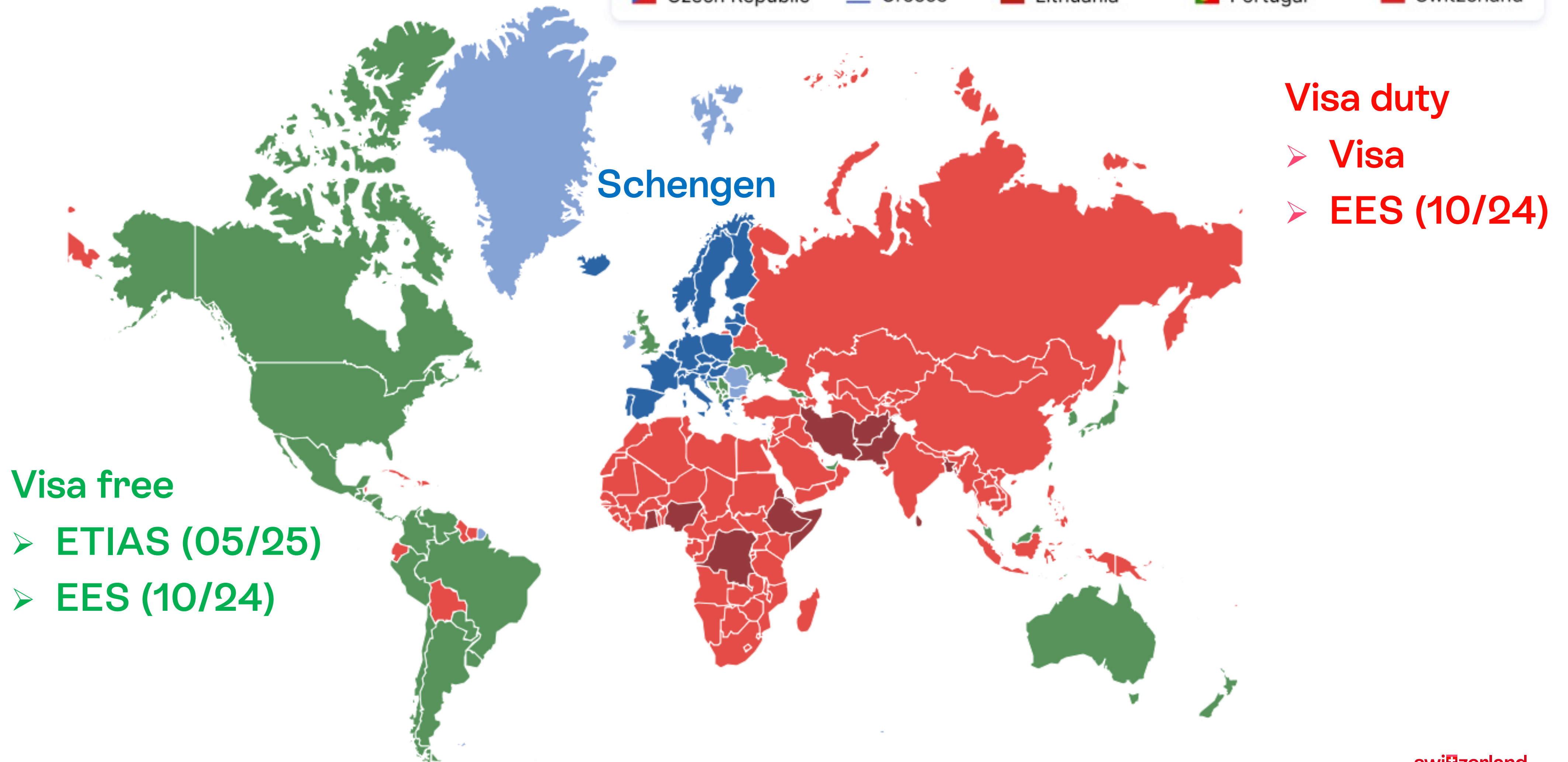
Europ. Travel Information & Authorisation System

Only authoritative source: [Link](#)

- **Entry Authorisation** for **all visa-exempt nationals** for **short stay travels** (< 90d) to any Schengen country
- Pre-Registration & Authorisation prior to 1st Schengen outer border crossing, authorisation valid for 3 years
- Implementation: May 2025 (tbc)

Schengen

 Austria	 Denmark	 Hungary	 Luxembourg	 Romania
 Belgium	 Estonia	 Iceland	 Malta	 Slovakia
 Bulgaria	 Finland	 Italy	 Netherlands	 Slovenia
 Croatia	 France	 Latvia	 Norway	 Spain
 Cyprus	 Germany	 Liechtenstein	 Poland	 Sweden
 Czech Republic	 Greece	 Lithuania	 Portugal	 Switzerland



Who needs ETIAS Authorisation?

 Albania	 Georgia	 Moldova	 Seychelles
 Antigua and Barbuda	 Grenada	 Montenegro	 Singapore
 Argentina	 Guatemala	 New Zealand	 Solomon Islands
 Australia	 Honduras	 Nicaragua	 South Korea
 Bahamas	 Hong Kong	 North Macedonia	 Taiwan
 Barbados	 Israel	 Palau	 Timor-Leste
 Bosnia and Herzegovina	 Japan	 Panama	 Tonga
 Brazil	 Kiribati	 Paraguay	 Trinidad and Tobago
 Brunei	 Kosovo	 Peru	 Tuvalu
 Canada	 Macao	 Saint Kitts and Nevis	 Ukraine
 Chile	 Malaysia	 Saint Lucia	 United Arab Emirates
 Colombia	 Marshall Islands	 Saint Vincent and the Grenadines	 United Kingdom
 Costa Rica	 Mauritius	 Samoa	 United States of America
 Dominica	 Mexico	 Serbia	 Uruguay
 El Salvador	 Micronesia		 Venezuela

North America



- Falling inflation, possible imminent interest rate cuts and a bullish stock-market are **boosting consumer confidence**.
- **Travel spending** has increased massively, showing that consumers are actively **prioritising travel over other expenses**.
- Changes in travel behaviour led from pent-up demand to the **new normal**. After the pandemic, Americans have embraced the **improved work-life balance** and are steadfastly refusing to return to the bad old days of few holidays and long hours at work.
- **Millennials** are on the threshold of their highest purchasing power and are making **Switzerland affordable for a new generation**.
- **Mountains are in demand** (+40% 2023). The integration of Swiss destinations to Ikon Pass, Epic Pass help to further stimulate the demand for our mountains.
- **New flight connections** from Zurich to Atlanta (Delta), DC (SWISS), Toronto (SWISS)

Germany



- **Cautious economic stabilisation**, inflation declining (2.2% March, lowest level since April 2021)
- Business climate has brightened noticeably, there are also signs of **stabilisation in private household sentiment**.
- High wage settlements have led to **higher available incomes** across broad sections of the population (4.7 per cent increase expected for 2024)
- Germans' **holiday plans are positive**: 73% of the population are planning to travel in 2024.
- Willingness to spend is high.
- **Nature, new impressions, culture, and touring** are the holiday motives among Germans that have grown noticeably since 2019
- Switzerland currently **among the top 10 short holiday destinations** for Germans (DRV, 2024)


Greater China

- **Gradual monthly recovery** from 18% up to 58%. Taiwan has almost fully recovered.
- **Flight capacity** is back at 75% with daily flights from Shanghai to Zurich, daily Hong Kong to Zurich and 5x Air China Beijing to Geneva. Air fares have normalised.
- **Visa processing** is largely normalised, thanks to the revamping of Schengen visa sections as well as the introduction of the ST China VPPS.
- China is again **Switzerland's #1 market in APAC** and prospected to reach 1 – 1.2 Mio overnights in 2024. By 2026 China will be **the world's biggest source market** for outbound travel again.
- While the **weakened economy** has absolutely unsettled Chinese society and will impact short and mid-term consumer behaviour, the larger uncertainty derives from **geopolitical complexities**.
- More households are added to the **middle- and upper-income brackets** than anywhere else. A shift in travel behaviours **towards experiences, FIT and smaller groups** is already visible.

Markets Intelligence for Swiss tourism partners

Research Reports

- Research Reports by Swiss Tourism Region
 - Development Tourism Region over all Markets
 - Benchmarking between Regions
- Research Reports by Source Market
 - Market Development over all Switzerland
- Data Sources: HESTA, TMS
- STNet.ch/Market Research: [Link](#)
- Access exclusively for ST Members
 - how to become member: [Link](#)

Switzerland. 

Research Report Zurich Region.

Tourism goals: summary

Market size & growth: In 2019, Zurich Region recorded 6.534 million overnights¹⁾ and 5.936 million overnights in 2022. With a market share of 16.5%, Zurich Region was the highest ranked tourism region (out of a total of 13 Swiss tourism regions) in 2019. The growth rate for overnights was 16.4% between 2015 and 2019. Between 2019 and 2022, the development was -9.2%. The corresponding growth ranking was 1 and 10 respectively.

Economic value: Zurich Region ranks 2nd with a 47.3% share of ****/***** nights in 2019.

First time visitors & length of stay: With a 68.5% figure for first-time visitors, Zurich Region ranks 2nd (TMS 2017). With a length of stay of 1.76 overnights it ranks 11th.

Balance: In 2019, the percentage split of the low season months "March-May" and "September-November" was 24.8% (=rank 4) and 25.2% (=rank 6), respectively.

¹⁾ nights in hotels, unless otherwise stated

		value	rank (out of 13 regions)
1. market size & growth	2019	6.534 M.	1
	2022	5.936 M.	1
	2015-19	16.4%	1
	2019-22	-9.2%	10
2. economic value	share ****/*****-nights 2019	47.3%	2
3. first time visitors	share 2017 (TMS)	68.5%	2
4. length of stay	2019	1.76	11
5. balance	share off-season "March-May" in 2019	24.8%	4
	share off-season "Sept-Nov" in 2019	25.2%	6
	share core summer "June-Aug" in 2019	30.5%	9
	share core winter "Dec-Feb" in 2019	19.5%	5

source of data: FSO/hotel statistics, unless otherwise stated

Source markets with a high affinity to Zurich Region: In 2019, guests in Zurich Region are overrepresented from the following source markets: Indonesia, Singapore, India, Philippines, and Brazil (see table at page 3).

1

Quarterly Market Development Outlook

- Overnight levels and growth by Market
 - since 2008
 - 3 years outlook
- Quarterly Updates
 - Jan / May / Jul / Oct
- STNet.ch/Markets: [Link](#)

	2023	Growth 24	2024	Growth 25	2025	Growth 26	2026	Growth 27	2027
Snare Short Haul*** %	Zf.1%	0	Zf.4%	0	Zf.1%	0.0	Zf.2%	0.0	Zf.6%
Total Short Haul***	10 970 990	0.3%	10 999 371	1.4%	11 149 868	1.6%	11'325'365	2.9%	11'651'879
Share Switzerland %	52.7%	0	50.8%	0	49.6%	0.0	48.7%	0.0	48.0%
Total Switzerland	20 854 814	-2.0%	20 437 717	-0.3%	20 376 404	-0.4%	20'294'899	0.0%	20'294'899
Total Markets****	39 604 025	1.5%	40 196 685	2.2%	41 075 874	1.4%	41'650'769	1.5%	42'282'940
Total Foreign Markets****	18 749 211	5.4%	19 758 968	4.8%	20 699 469	3.2%	21'355'871	3.0%	21'988'042
Priority Markets	34 682 981	0.2%	34 749 861	0.9%	35 058 232	0.5%	35'240'778	0.9%	35'558'632
China	494 547	45.0%	717 092	25.0%	896 366	15.0%	1'030'820	10.0%	1'133'902
Hong Kong	118 320	10.0%	130 151	13.0%	147 071	10.0%	161'778	5.0%	169'867
Taiwan	203 782	25.0%	254 728	9.0%	277 653	9.0%	302'642	5.0%	317'774
Greater China	816'648	34.9%	1'101'971	19.9%	1'321'090	13.2%	1'495'240	8.4%	1'621'543
Bahrain	14'390	30.0%	18'707	21.0%	22'636	8.0%	24'447	3.0%	25'180
Kuwait	103'323	20.0%	123'987	5.5%	130'806	4.9%	137'216	3.4%	141'881
Oman	25'994	28.5%	33'403	12.0%	37'411	2.5%	38'347	2.8%	39'420
Qatar	90'190	12.0%	101'013	6.5%	107'579	5.0%	112'958	3.1%	116'459
Saudi Arabia	308'784	5.0%	324'223	7.0%	346'919	6.0%	367'734	3.4%	380'237
UAE	307'861	2.0%	314'019	10.0%	345'421	9.0%	376'508	2.5%	385'921
GCC	850 543	15.0%	915 352	8.2%	990 772	6.7%	1'057'209	3.0%	1'089'099
Germany	3 770 764	-0.2%	3 763 222	-0.5%	3 744 406	0.4%	3'759'384	1.1%	3'800'737
France	1 399 029	-1.2%	1 382 240	0.0%	1 382 240	-0.5%	1'375'329	2.0%	1'402'836
Italy	878 287	-1.4%	865 991	0.4%	869 455	-0.7%	863'369	3.0%	889'270
Netherlands	704 752	1.5%	715 323	4.8%	749 301	2.7%	769'532	2.9%	791'541
Belgium	556 316	2.5%	570 224	3.6%	590 524	5.9%	625'365	3.1%	644'751
Luxemburg	105 310	3.0%	108 469	2.9%	111 604	-2.9%	108'367	-1.5%	106'742
Benelux	1 366 378	2.0%	1 394 016	4.1%	1 451 429	3.6%	1'503'264	2.6%	1'543'034
Switzerland	20 854 814	-2.0%	20 437 717	-0.3%	20 376 404	-0.4%	20'294'899	0.0%	20'294'899
UK	1 687 401	-0.6%	1 677 276	-0.9%	1 662 181	-0.1%	1'660'518	2.0%	1'693'729
USA	3 059 118	5.0%	3 212 074	1.5%	3 260 255	-0.9%	3'231'565	-0.3%	3'223'486
Active Markets	4 680 249	10.7%	5 181 303	10.8%	5 743 152	6.6%	6'122'338	4.9%	6'421'846
Australia/Neuseeland	442 969	-2.8%	430 610	13.5%	488 742	4.8%	512'104	4.8%	536'839
Brazil	287 027	10.0%	315 730	6.8%	337 294	1.8%	343'197	0.9%	346'114
India	602 940	45.0%	874 263	17.2%	1 024 636	5.2%	1'077'815	-0.3%	1'074'581
Japan	192 412	35.0%	259 756	35.4%	351 709	30.8%	460'176	15.3%	530'445
Canada	311 237	3.4%	321 913	6.5%	342 773	4.0%	356'587	2.6%	365'858
Denmark	123 848	0.5%	124 430	1.3%	126 035	2.3%	128'984	3.9%	133'950
Finland	78 407	1.8%	79 850	-3.2%	77 334	1.7%	78'649	1.8%	80'057
Norway	83 013	-2.5%	80 938	2.4%	82 913	1.8%	84'438	2.6%	86'617
Sweden	158 628	-2.0%	155 456	4.5%	162 467	3.8%	168'673	3.9%	175'302
Nordic Countries	443 896	-0.7%	440 673	1.8%	448 749	2.7%	460'745	3.3%	475'926
Austria	354 411	3.0%	365 044	9.0%	397 897	6.5%	423'761	6.5%	451'305
Poland	209 468	0.3%	209 992	3.2%	216 669	8.2%	234'415	4.5%	244'846
Russia	104 817	-1.7%	103 025	30.0%	133 933	16.5%	155'965	35.0%	210'552
Indonesia	124 596	4.9%	130 751	3.7%	135 615	1.3%	137'365	3.3%	141'843
Malaysia	150 487	-10.0%	135 438	-6.4%	126 756	0.9%	127'872	0.6%	128'626
Singapore	244 824	2.0%	249 720	1.8%	254 165	-0.4%	253'072	-0.2%	252'490
Thailand	233 934	6.0%	247 970	5.2%	260 914	7.7%	280'978	0.3%	281'681
SEA (excl. Philippines)	753 841	1.3%	763 880	1.8%	777 451	2.8%	799'287	0.7%	804'640
Spain	476 742	4.0%	495 812	4.4%	517 479	4.2%	539'213	4.6%	564'179
South Korea	381 424	25.0%	476 780	19.6%	570 229	6.7%	608'434	6.7%	649'200
Czech Republik	119 064	4.0%	123 826	9.5%	135 590	11.1%	150'640	11.1%	167'361
Antennas (excl. Saudi Arabia)	240 796	10.3%	265 521	3.4%	274 490	4.8%	287'653	5.1%	302'462
Portugal	160 733	10.9%	178 253	6.5%	189 840	4.7%	198'762	4.7%	208'104
Saudi Arabia	308'784	5.0%	324'223	7.0%	346'919	6.0%	367'734	3.4%	380'237
Philippines	80 062	9.0%	87 268	-3.0%	84 650	5.0%	88'891	6.2%	94'358
Emerging Markets	564 592	6.4%	600 958	4.9%	630 645	4.1%	656'193	4.2%	684'010
Hungary	80 578	3.1%	83 068	5.4%	87 529	5.0%	91'862	4.7%	96'170
Greece	95 863	5.0%	100 656	2.0%	102 680	-0.9%	101'735	-2.3%	99'405
Romania	112 591	6.6%	120 000	5.7%	126 816	7.7%	136'517	4.0%	141'937
Turkey	126 181	6.8%	134 736	1.9%	137 256	2.1%	140'138	7.7%	150'887
South East Europe	415 214	5.6%	438 461	3.6%	454 280	3.5%	470'252	3.9%	488'399
Argentina	46 249	6.7%	49 348	5.0%	51 810	7.1%	55'468	6.4%	59'013
Vietnam*****	37 131	18.1%	43 851	6.0%	46 482	6.0%	49'271	6.0%	52'228
Iran*****	15 580	5.0%	16 359	6.0%	17 341	6.0%	18'381	6.0%	19'484
South Africa	50 418	5.0%	52 939	14.7%	60 731	3.4%	62'820	3.3%	64'887
Israel	193 924	-3.8%	186 099	11.8%	209 007	5.5%	220'545	3.0%	227'130

Market Briefings

Switzerland Tourism.

2023 Lokalierte J Localized ann

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Switzerland Tourism. 2023 Localized Annual Planning. 2



Switzerland Tourism.

Market Update November/December

Editorial

Dear Partners,

The year 2023 will not only remain extraordinary strong one, it's as we biggest industry crises behind, not look back into a very exciting year activities worldwide, including 60 activation.

With the end of 2023, we are as our bimonthly "Market Update" in! you with updates on our markets the time, when you should be exp

Best personal regards,

Simon Bosshart
Head Markets East

Swiss Tourism, Schweiz Tourismus, Svizzera Turismo, Switzerland Tourism.
Morgenstrasse 54, Postfach, CH-8004

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 4.8% 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 3.5%.

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 3.2% 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 'Swisustainable' 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 feu - Zurich - 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. Onsdie de perfecte fusie van wetenschap en elegantie in het CERN
- SCIB enews (December) to 1515 contacts: Switzerland, always stylish and innovative.
- Rendezvenement Magazine: 2 pages advertorial: 4 raisons qui font de la Suisse l'endroit idéal pour vos événements durables. 4 redenen waarom Zwitserland de 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, exd. press event, online presence

Winter Marketing

Swiss Tourism, Schweiz Tourismus, Svizzera Turismo, Switzerland Tourism.
Morgenstrasse 54, Postfach, CH-8004 Zürich, Telefon +41 (0)44 288 11 11, MySwitzerland.com



switzerland Kooperationen Events & Marketing Wissenswertes Über uns Suche Medien Jobs & Karriere DE

Market Insights

Stay up to date and in touch with Switzerland Tourism's global market network. In this exclusive member section you find detailed information on the market status and outlook, ST localised strategy and activities review and planning as well as the contact details on our global markets team.

Europe

Find all our active markets in Europe hereafter. Click to learn more.

[Mehr erfahren →](#)

Americas

The Americas comprises Brazil, the USA, and Canada. Choose one of the following markets which you would like to know more about.

[Mehr erfahren →](#)

Asia Pacific

Find all our active markets in Asia Pacific hereafter. Click to learn more.

[Mehr erfahren →](#)

Market - Emerging Markets

Switzerland Tourism is active in selected

Heads of Markets in Zurich

Please do not hesitate to contact us for

ST media contacts worldwide


Here you can find the contact details for all ST

https://www.stnet.ch/de/

Market Briefings

Market – USA

Switzerland Tourism has been operating in the USA since 1908. With 2.5 mio generated overnights in 2023, the US is Switzerland's 3rd biggest source market. Hereafter you find the most important market information.




Directory

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2. [Bi-monthly market update](#)
3. [Localized annual plan 2024](#)

Know the basics

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Meet the Team

The 17 team members based in the US work primarily out of New York, with each a media and trade representative on the West Coast, based in Los Angeles and San Francisco.

Campaigning and Activation


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Market activities

Last updated: mm/dd/yy by initials

Partner offering (STzM) ▾

Market update and reporting of finalized activities 2023 ▾

Localized annual plan 2024

Last updated: 01/26/2024 by CZ

Market Situation

The United States were one of the main recovery drivers for the Swiss Tourism industry in 2023. With the increase in overnights compared to the record year of 2019 expected to top 20%, the market is truly back on top. While we expect the growth to continue in 2024, the rate will be a bit more modest but still in the high single digits.

As we entered another presidential election year, and with the first two republican primaries won by former president Donald Trump, it looks like the nation will get to choose between two widely unpopular candidates. A rematch of 2020 the voters say they don't want. Incumbent President Biden's age of 81 is a concern even for many democrats, who fear he cannot run an effective campaign, let alone finish a second term in office. While he still gets overwhelming support from his party, there is a vocal group of young, progressive voters who strongly disagree on foreign policy (Israel/Gaza) with the Biden administration and threaten to withhold their support. Of course, Donald Trump, at 77, is not only almost as old as Mr Biden, but also faces 91 felony counts across tow state courts and two different federal districts. Any of which could potentially end up with a prison sentence.

With a wide array of geo-political issues, ranging from Russia/NATO tension, Israel/Gaza conflict, and the strategic competition between the US and China, the broken American political system looks like it is not able to provide the unifying, strong leadership it will need.

Economy

> STNet/Markets: [Link](#)

Market Key Partner Reportings

- Bi-annual Activity Reporting for Market Key Partners
 - Jul 24: Mid Year Reporting 2024
 - Feb 25: Year End Reporting 2024
- New and improved design
 - Synchronised lay out and structure in all markets

C&A: Print Ad

Print Double Spread Magazine Ad in India Today Spice
A Visual in landscape format of Zurich was used.

- Dates: Mar 10 – 15, 2023
- Partner: Zurich Tourism



Results
• Top Marketing Contacts: 1,486'854 M

From the historic old town to the young and vibrant Zurich-west, from the inviting blue waters of Lake Zurich to snow-capped mountains, there are plenty of amazing things to do in Zurich.
[MySwitzerland.com/Zurich](https://www.myswitzerland.com/Zurich)
Zürich, Switzerland.



Status Activities Summary

Marketing Discipline	Activity	Target	Results	Partner Investment	Status and comments
C&A	• Booklet	• 90'000 copies • 2'000'000 marketing contacts	• 100'000 copies • 2'488'789 marketing contadts	• CHF 7'000	Finalised with better results than expected. Market-specific content was key
KMM	• Media event in Tokyo	• 30 journalists • 15 media trips • 5 M media contacts	• 32 journalists • 15 mediatrips • Over 4.5 M media contacts	• CHF 9'000	Finalised, exclusive event for Zürich Tourism
KAM	• Sales oriented campaign with OTA's	• 6 M marketing contacts • 7'000 bookings	• 4 M marketing contacts • 4'500 bookings	• CHF 14'000	Ongoing till the end of January
KAM	• B2B2C campaign	• 7 M marketing contacts • 5'000 bookings	• 7,2 M marketing contacts • 6'000 bookings (TBC)	• CHF 23'000	Finalised
TOTAL				• CHF 53'000	

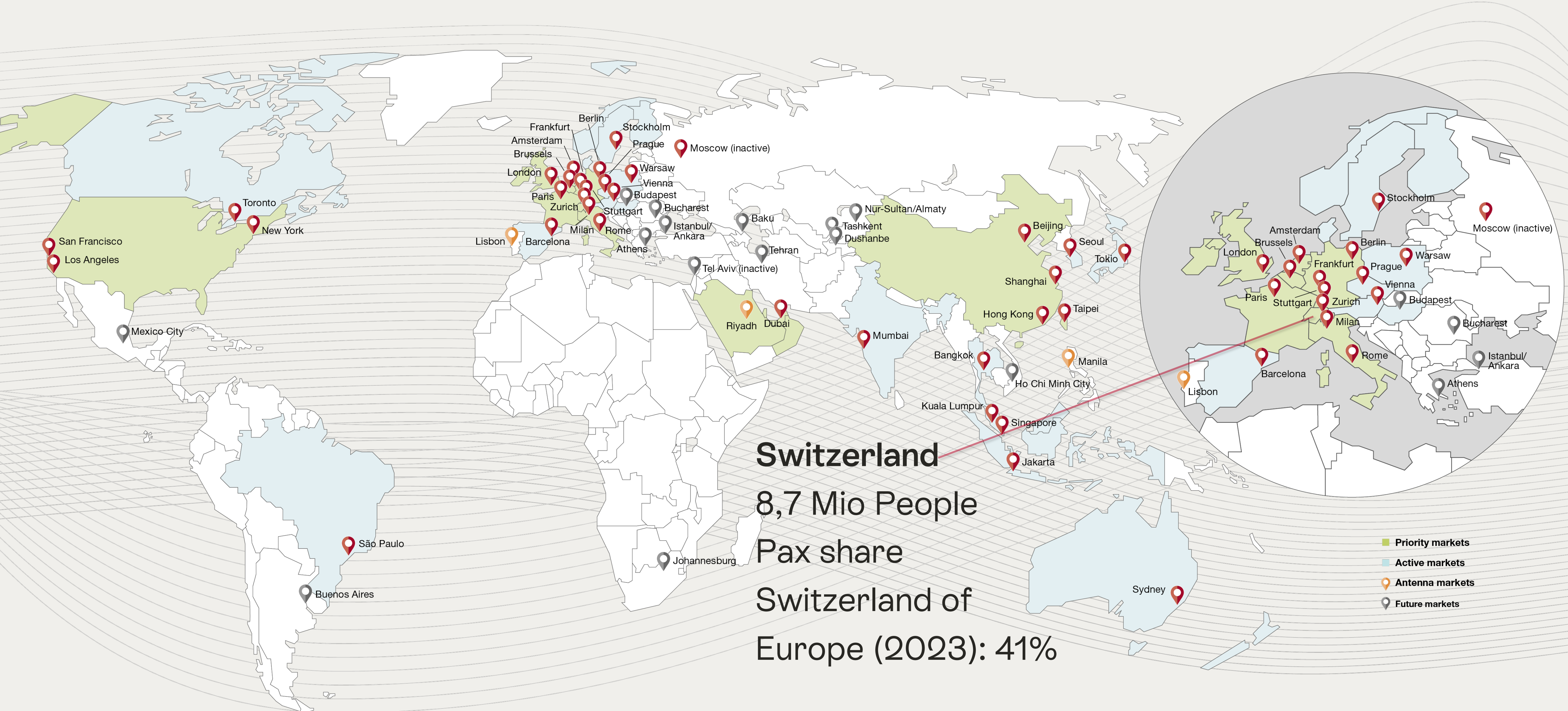


Markets Strategy

The World of our Markets



The World of our Markets - Switzerland

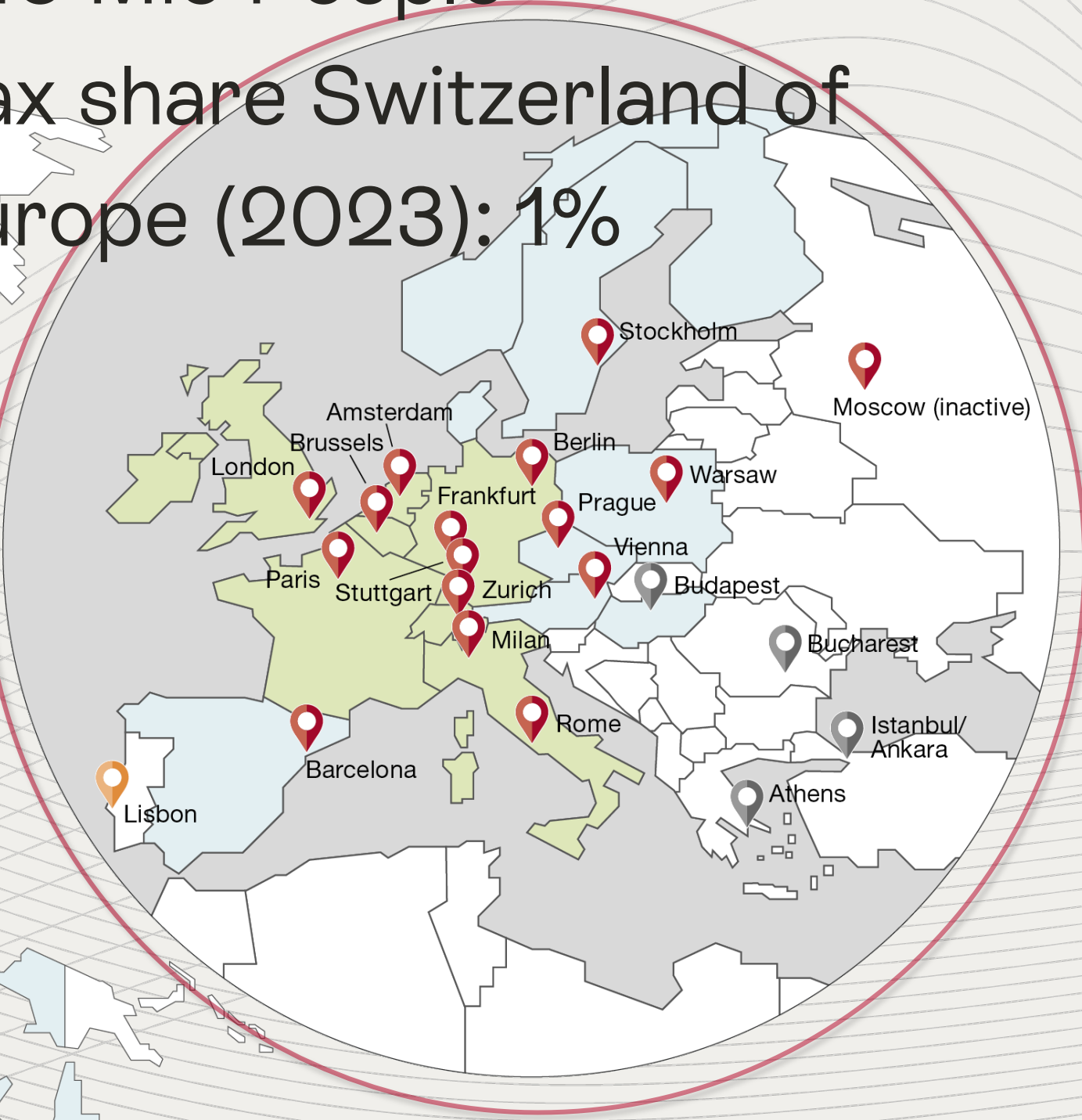
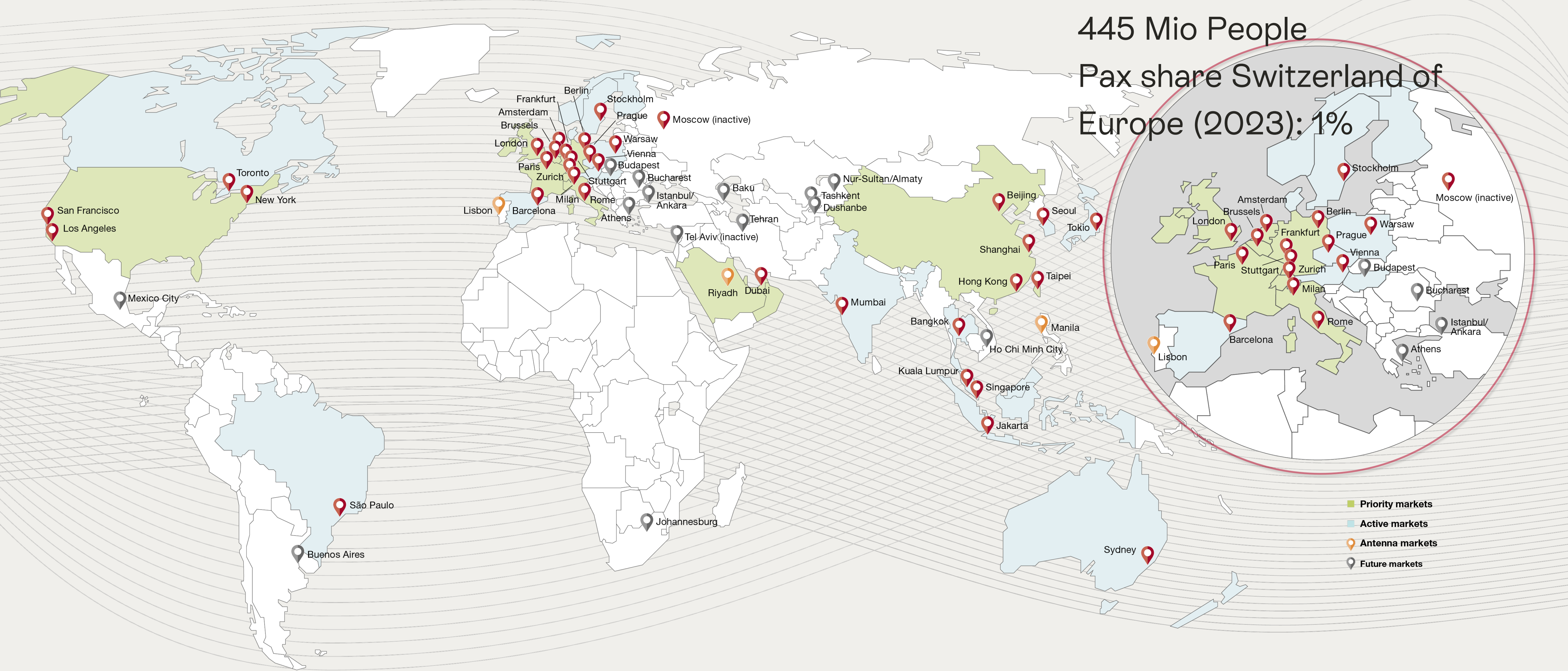


Switzerland
8,7 Mio People
Pax share
Switzerland of
Europe (2023): 41%

- Priority markets
- Active markets
- Antenna markets
- Future markets

The World of our Markets - Europe

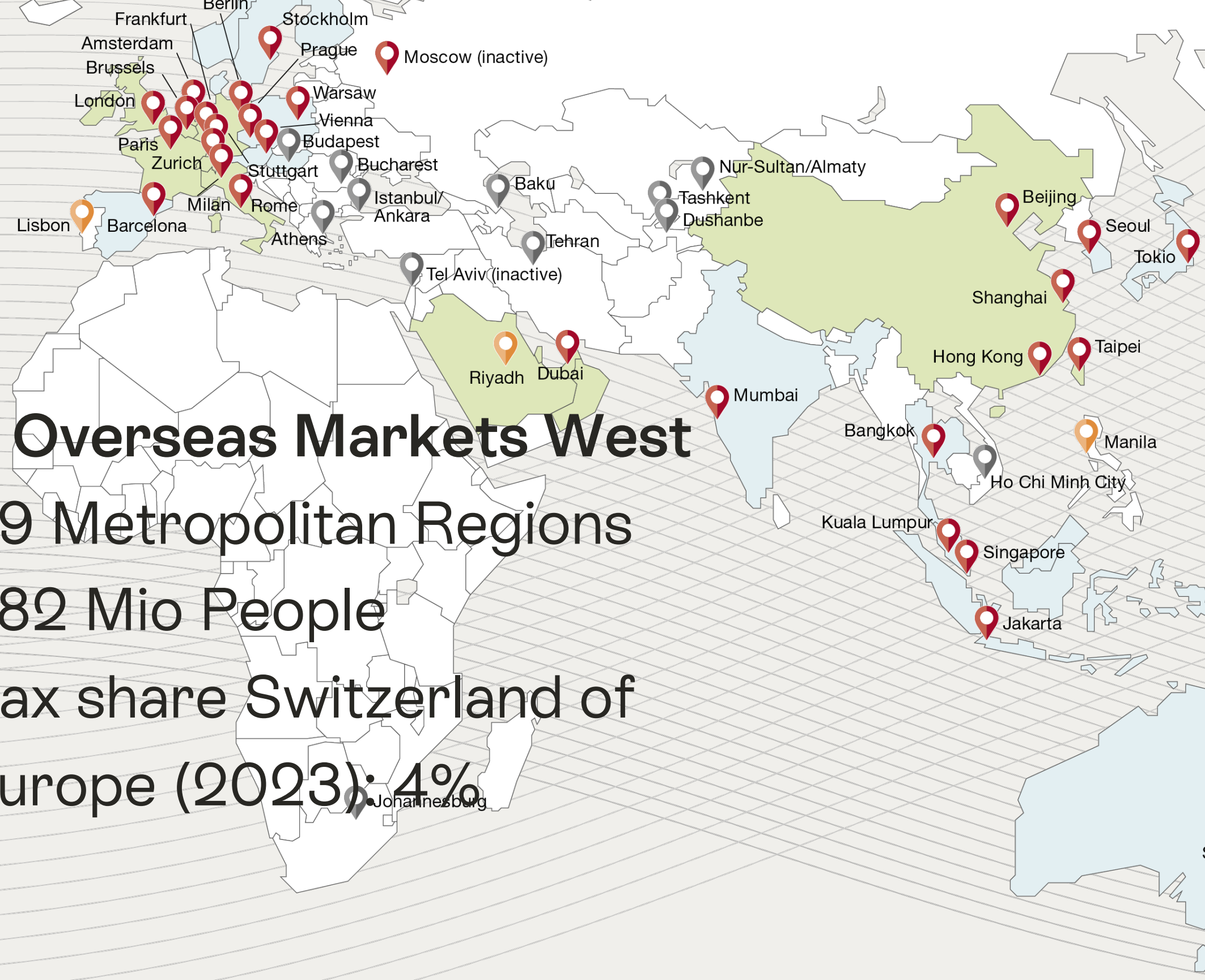
10 European Markets
79 Metropolitan Regions
445 Mio People
Pax share Switzerland of Europe (2023): 1%



The World of our Markets – Overseas West

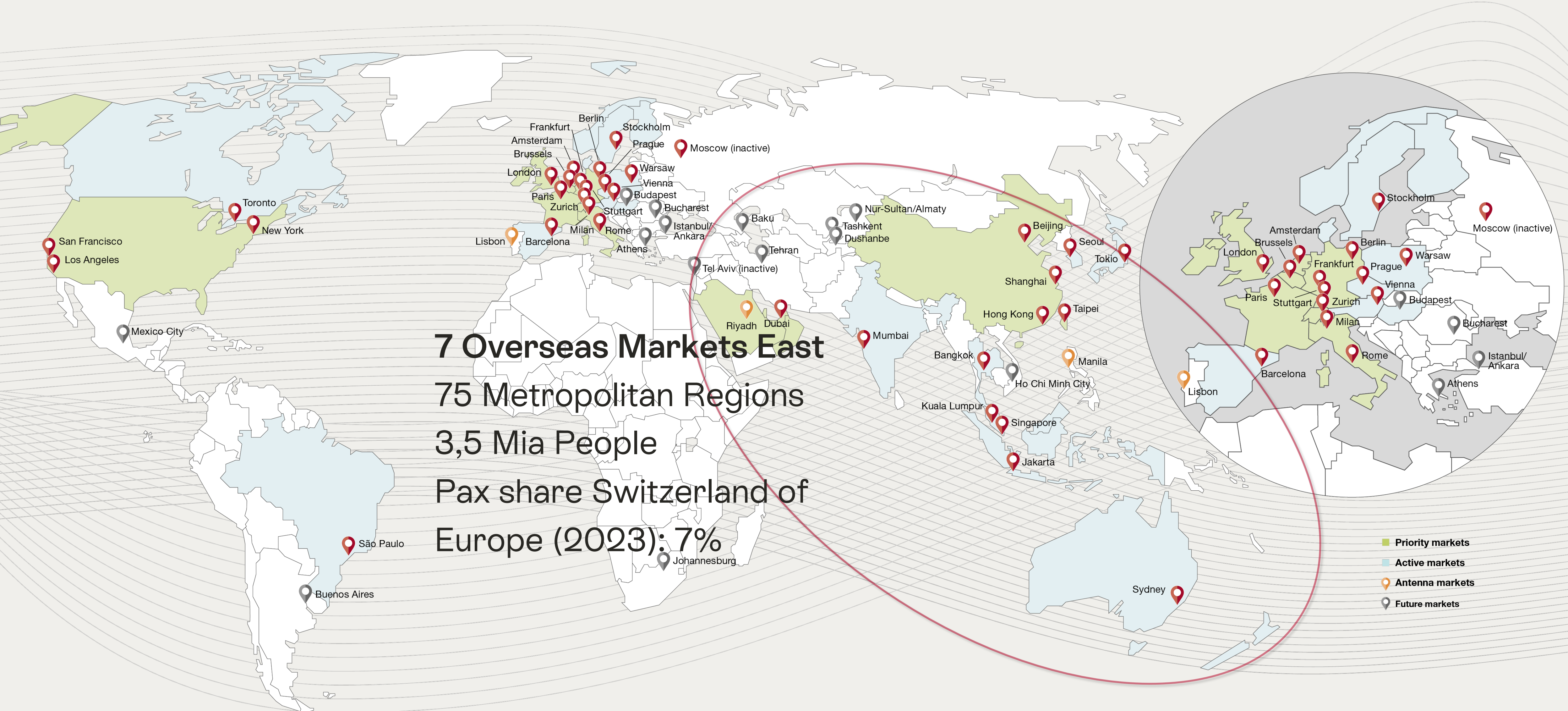


3 Overseas Markets West
29 Metropolitan Regions
582 Mio People
Pax share Switzerland of Europe (2023): 4%

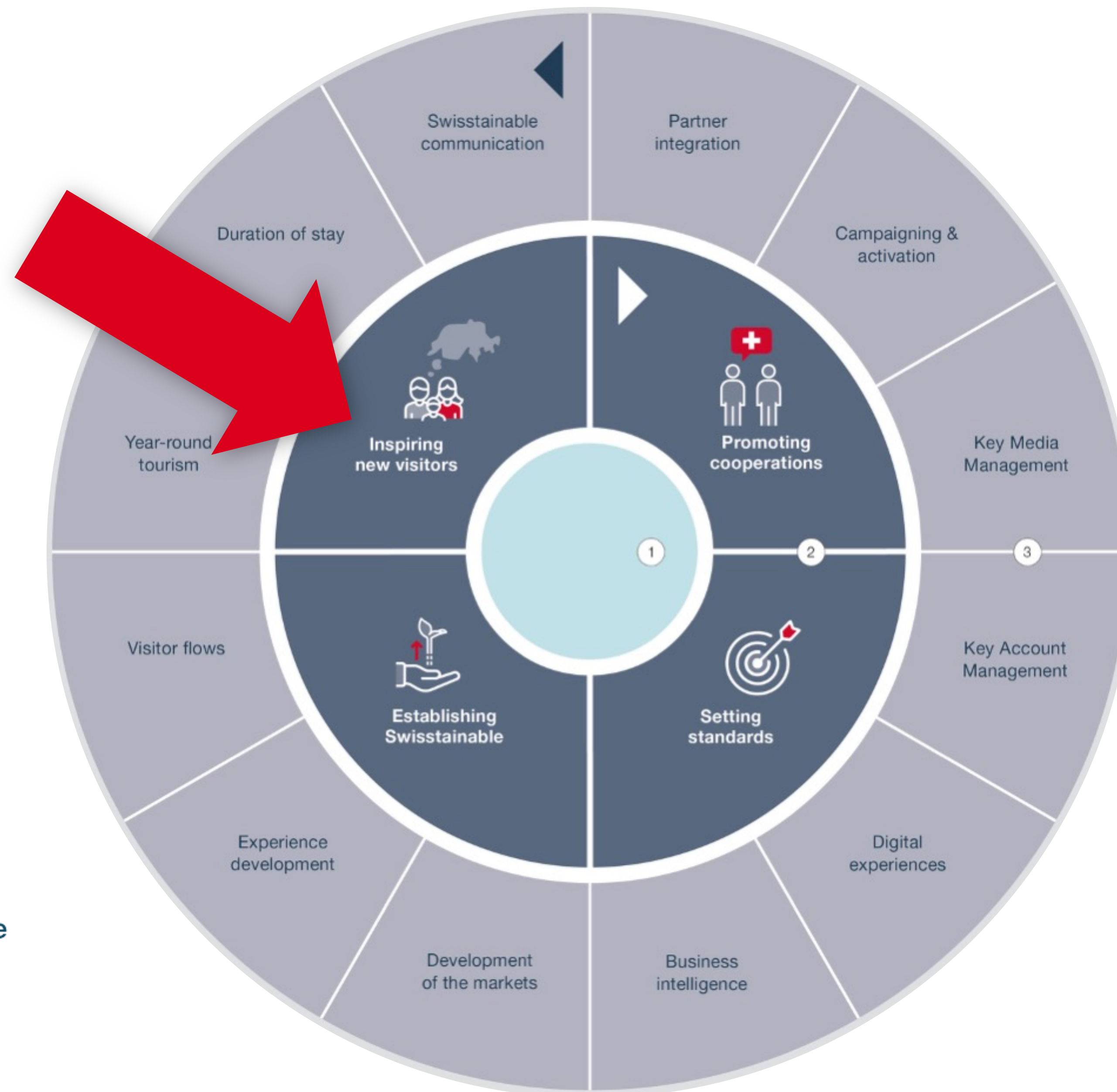


- Priority markets
- Active markets
- Antenna markets
- Future markets

The World of our Markets – Overseas East



Strategy wheel



(In Spanish)
Wow, that's stunning!

Travel Better

We inspire our guests - directly and indirectly - for a better travel experience in Switzerland.

Five overriding Calls-to-Action guide us in our mission.

Lower your carbon footprint and focus on suppliers offering sustainable products and services.

Responsible travel

Reconsider peak seasons, discover Switzerland away from the crowds.

Extend the Season

Slow down your travel pace and get more Switzerland.

Stay Longer

Visit our landmarks, but explore Switzerland's hidden gems on detours.

Explore Hidden Gems

Hop on our trains, boats, busses and cable cars.

Travel by Train

Steering

We use Steering Tools – one for each Call-to-Action – to fulfill our mission.

We grow the availability of Swisstainable Supply within the markets' product portfolios.

Swisstainable

We showcase exploring Switzerland in Autumn, and support the travel industry in sourcing the right products.

Autumn

We promote the extension of the regular duration of stays, with a specific focus on Mono-Switzerland itineraries.

Duration of Stay

We trigger the interest in new destinations and activities, while building on our landmarks.

Geographical Distribution

We promote the public transportation products and services for FIT's as well as small group travel.

Public Transportation

Our Markets Strategy

Secure Switzerland

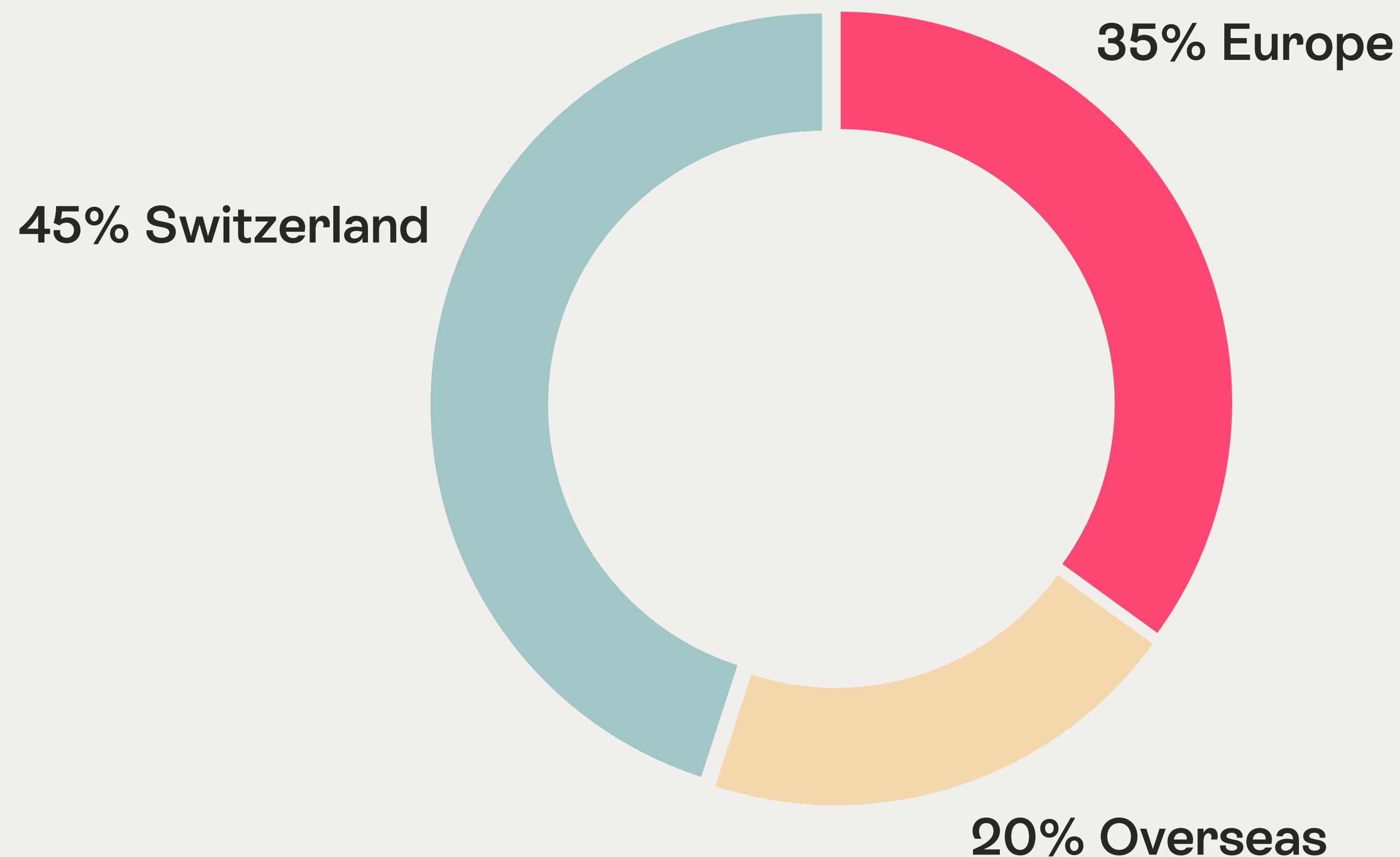
- Focus on Growth and Steering
- Diversity of Switzerland, emotional story telling, hidden gems

Win Back Europe

- Focus on Growth before Steering
- New guests, esp. younger target groups

Steer Overseas

- Focus on Steering before Growth
- extension length of stay, extension of seasons (winter, autumn, spring), public transportation, individual travelers and small groups



Along the Funnel

Our Central Campaigns, Partner Campaigns as well as the Markets' marketing activities complement each other and guide our guests along the marketing funnel.

Our Guests

We

Dream

Attract

Plan

Inform

Book

Convert

Explore

Engage



Along the Funnel

Through our long term engagement and cooperation with traditional and new media channels, we reach and inspire our potential guests in their dreaming and planning phase

Our Guests

Dream

Plan

Book

Explore



We

Identify and Network
- Media Relation Management
- Media Conferences and Events

Create and Research
- Media Releases, Newsletters
- Media Content Support

Trigger Coverage
- Media Cooperation
- Media Trips

Along the Funnel

Working with the travel industry allows us to impact their sourcing and product management.

Our Guests

We

Dream

Plan

Book

Explore

Source and Connect

- Industry Benchmarking
- Identifying Target Persona
 - Trade Fairs
 - Networking Events
 - STM

Advise and build

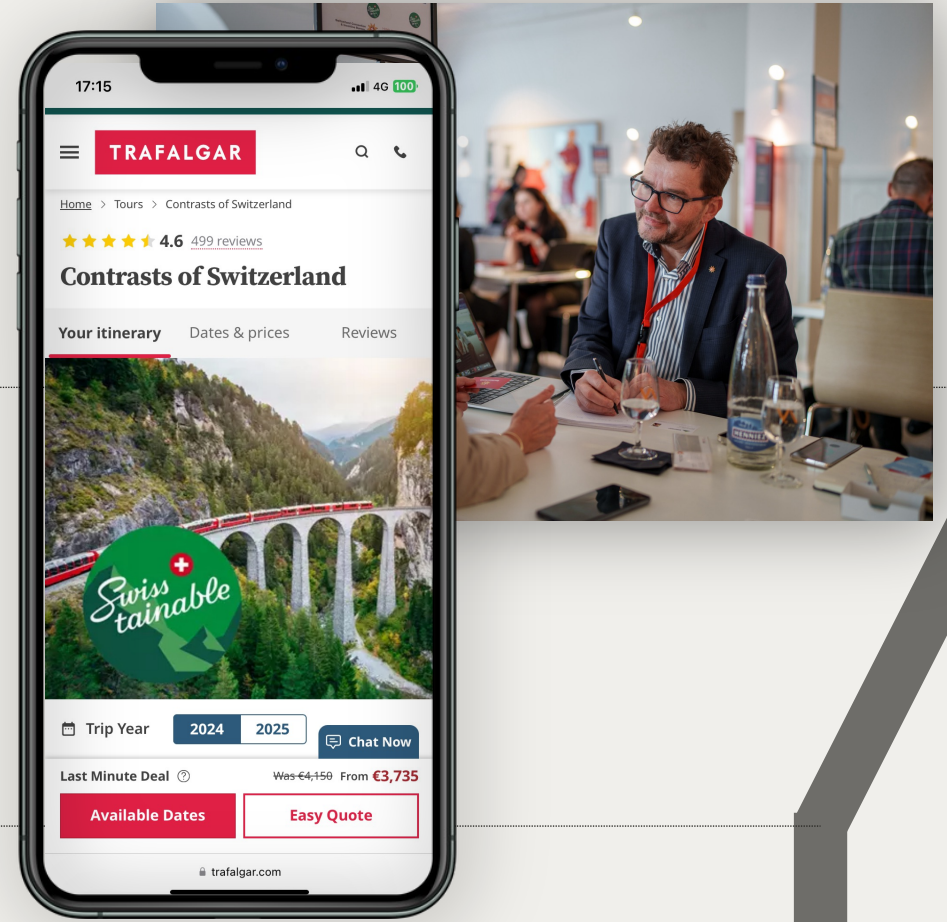
- STM, STE and Roadshows
- MySwitzerland.Pro
- Framework (visa, flights etc)

Train and support

- Webinars, Roadshows and Sales calls
- Familiarization trips
- eLearning

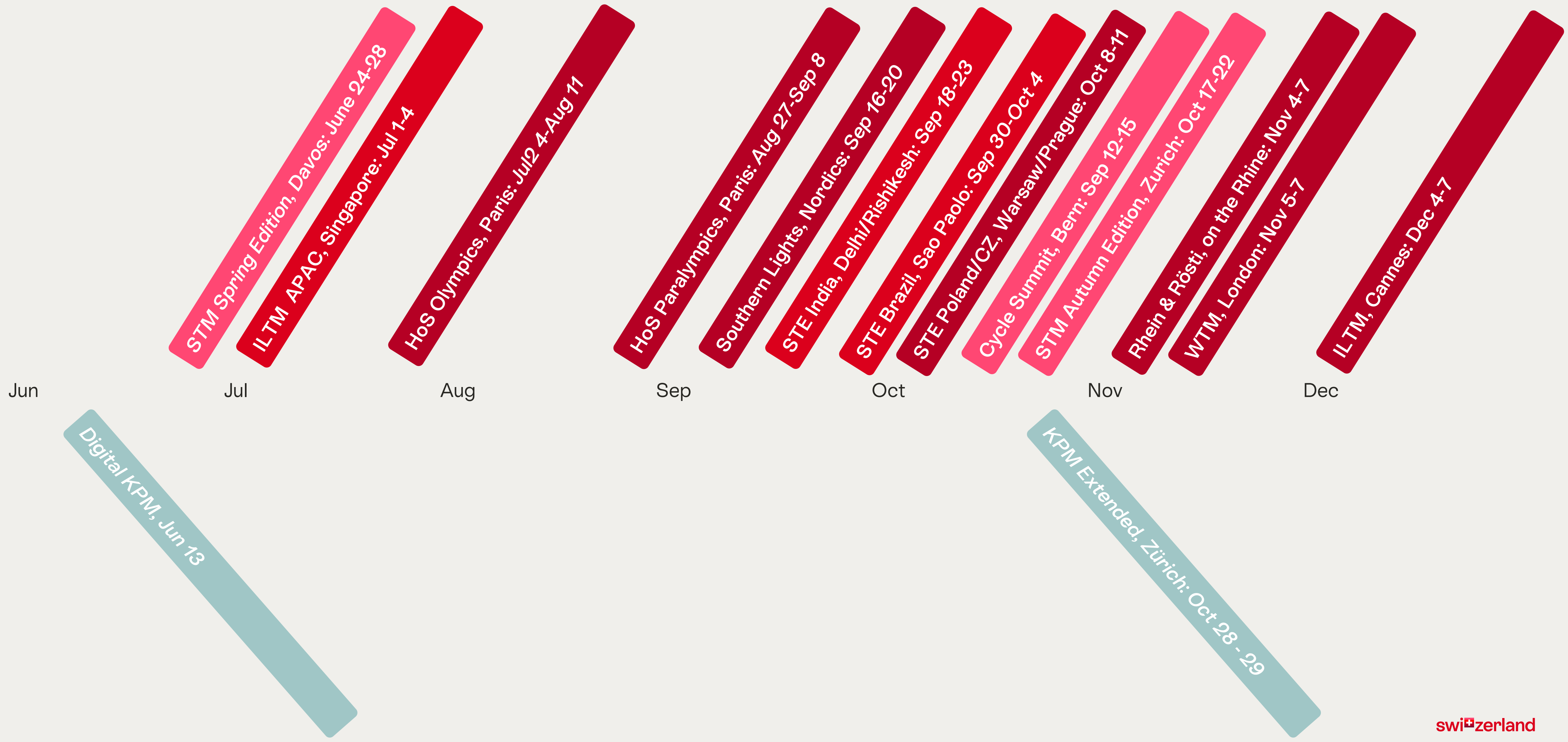
Foster Sales

- Marketing Agreements
- Media activities
- Sales oriented Marketing Promo



Markets Activities Agenda

ST Global Activities Agenda 2024





Q&A

Thank you.

swi+zerland