



Szwajcaria.

Market Poland - your chance.

Turn the boom of the 2020/21 winter season into lasting collaborations.



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Why Poland?

- **Large market: 38 mln** inhabitants
- 21% of Poles (= 6.7 mln) plan their holidays abroad
- **Young** (53% are under 35 years old), love mountains and touring
- **Switzerland is a top choice destination:** +71% hotel ON in the last decade (no other European source market grew as strongly as Poland)
- **All year round** (Su 51% vs. Wi 49%) and **all over Switzerland**
- Length of stay: **2.6 hotel ON**, rank 3rd
- Approximately **CHF 160 of expenses** per person and day
- **Mainly in 3* and 4* hotels** (almost 25% ON of each category)



2020/21 was a very successful winter season.

- Given the Covid-19 restrictions, many new Polish Tour Operators (re)discovered Switzerland during the 2020/21 winter season.
- The excellent numbers of January remained high throughout the first quarter of 2021, with a relatively even distribution across regions and destinations.
- Most Tour Operators want to keep Swiss destinations in their offers going forward: this is a unique opportunity to strengthen existing partnerships and develop new ones.
- The online workshop “Switzerland welcomes Poland” with Polish Tour Operators on 22 April 2021 has been organized for that precise purpose.



How does the Swiss hotel industry develop?

2019-2020, Selected months: All, ST market: All

Please select:

Comparison year: 2019

Focus year: 2020

Month: All

ST markets: Poland

Single markets: Poland

Markets: 3 groups All

Tourism region: All

Tourism zone: All

Latest available data: December 2020



Arrivals

↓ -45.8%

2020: 10,703,428

2019: 19,764,557

Overall



Overnights

↓ -40.0%

2020: 23,730,738

2019: 39,562,039

↓ -56.5%

2020: 31,462

2019: 72,287

Filtered markets

↓ -45.5%

2020: 102,052

2019: 187,147

↓ -17.1%

2020: 7,694,605

2019: 9,279,360

Switzerland

↓ -8.6%

2020: 16,389,391

2019: 17,922,428

↓ -71.3%

2020: 3,008,823

2019: 10,485,197

Foreign countries

↓ -66.1%

2020: 7,341,347

2019: 21,639,611

↓ -51.7%

2020: 1,998,863

2019: 4,140,436

Eurozone

↓ -45.7%

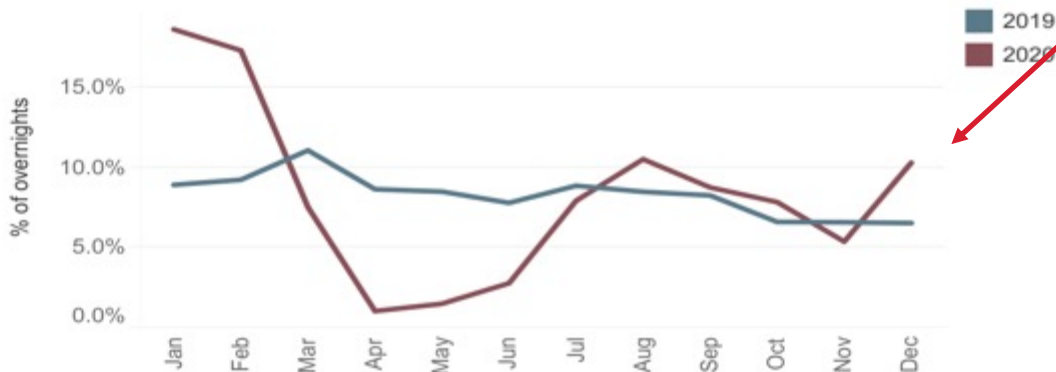
2020: 4,789,063

2019: 8,812,316

Development years



Monthly distribution





January 2021 ON Statistics (I).

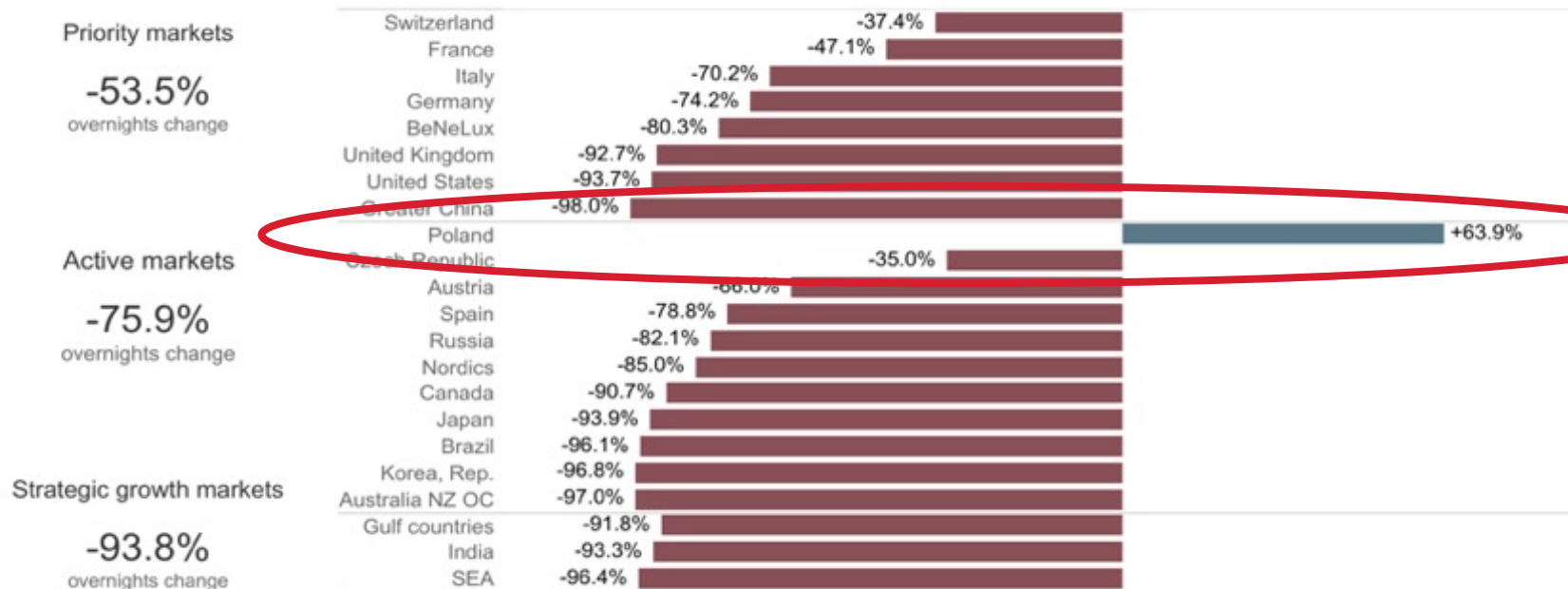
How does the Swiss hotel industry develop? - Year to date

Switzerland Tourism.



2020-2021, Selected months: January, ST market: All

Please select: Comparison year 2020 Focus year 2021 Month January Tourism Region All Tourism Zone All Latest available data: January 2021





January 2021 ON Statistics (II).

How does the Swiss hotel industry develop? - Year to date

Switzerland Tourism.



2020-2021, Selected months: January, ST market: All

Please select: Comparison year **2020** Focus year 2021 Month January ST markets Poland Single markets All Markets: 3 groups All Tourism region All Tourism zone All Latest available data: January 2021



Arrivals

↓ -60.9%
2021: 524,188
2020: 1,339,067

↑ +13.5%
2021: 6,241
2020: 5,501

↓ -40.1%
2021: 424,109
2020: 707,576

↓ -84.2%
2021: 100,079
2020: 631,491

↓ -74.4%
2021: 71,138
2020: 277,399



Overnights

↓ -58.2%
2021: 1,269,322
2020: 3,037,206

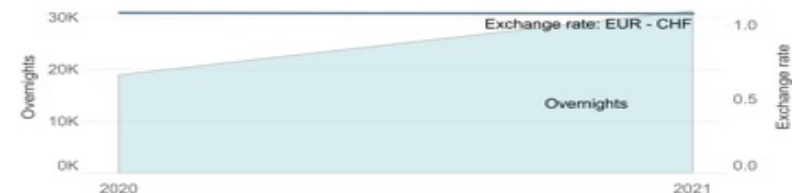
↑ +63.9%
2021: 31,270
2020: 19,078

↓ -37.4%
2021: 962,364
2020: 1,536,861

↓ -79.5%
2021: 306,958
2020: 1,500,345

↓ -70.8%
2021: 197,930
2020: 677,677

Development years



Monthly distribution



Tourism regions



Tourism zones



Top 15 municipalities

	Focus Year	Change
	defl	
1 Laax	10,858	+169.7%
2 Davos	2,510	+872.9%
3 St. Moritz	2,174	+243.4%
4 Samnaun	1,662	+544.2%
5 Lauterbrunnen	1,359	+44.7%
6 Zermatt	1,133	+151.8%
7 Arosa	1,003	+302.8%
8 Klosters-Seme..	837	+1001.3%
9 Flims	795	+521.1%
10 Andermatt	500	+1370.6%
11 Zürich	492	-73.2%
12 Grindelwald	483	+468.2%
13 Vaz/Obervaz	476	+4680.0%
14 Bregaglia	433	
15 Engelberg	361	+702.2%



February 2021 ON Statistics (I).

How does the Swiss hotel industry develop? - Year to date

Switzerland Tourism.

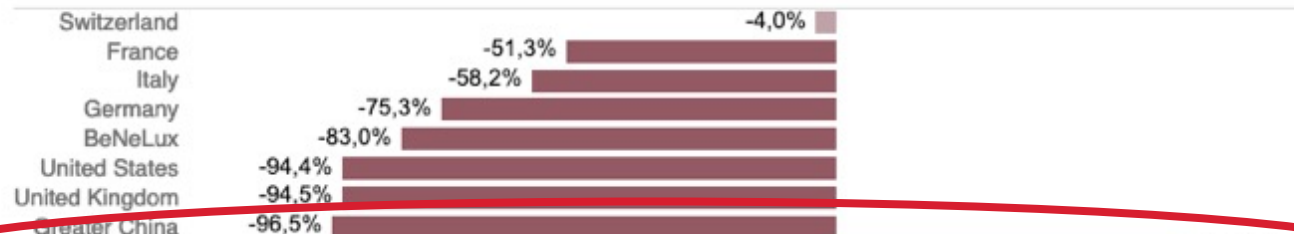


2020-2021, Selected months: luty, ST market: All

Please select: Comparison year: 2020, Focus year: 2021, Month: luty, Tourism Region: (All), Tourism Zone: (All), Latest available data: lutego 2021

Priority markets

-33,0%
overnights change



Active markets

-77,2%
overnights change



Strategic growth markets

-93,9%
overnights change





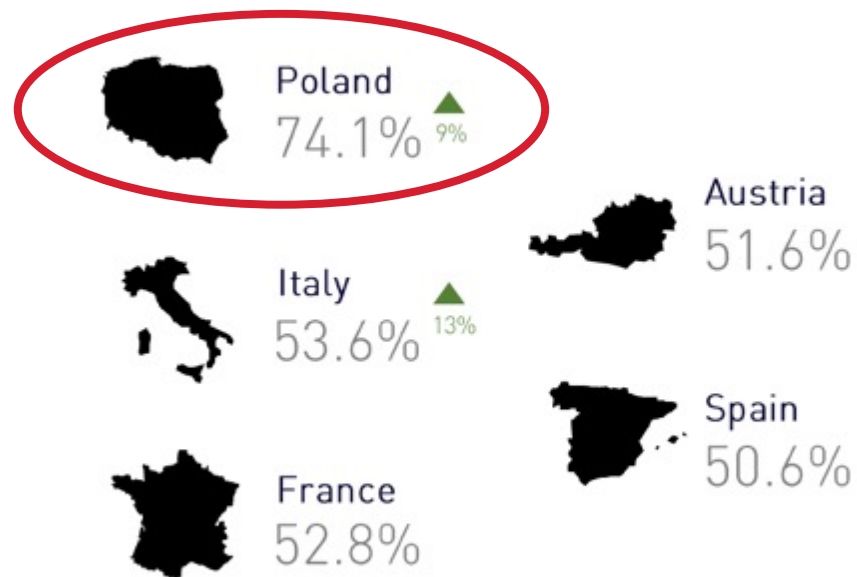
February 2021 ON Statistics (II).

	France			Germany			Poland			Switzerland		
	Comparison Year def!	Focus Year def!	Change	Comparison Year def!	Focus Year def!	Change	Comparison Year def!	Focus Year def!	Change	Comparison Year def!	Focus Year def!	Change
Aargau Region	1 657	531	-68,0%	11 727	4 420	-62,3%	778	482	-38,0%	36 481	22 854	-37,4%
Basel Region	5 056	1 203	-76,2%	17 012	3 368	-80,2%	1 236	267	-78,4%	39 754	20 413	-48,7%
Bern Region	15 329	7 302	-52,4%	40 765	8 135	-80,0%	1 742	2 575	+47,8%	230 680	248 931	+7,9%
Eastern Switzerland	1 358	391	-71,2%	19 171	5 665	-70,5%	932	358	-61,6%	95 220	80 941	-15,0%
Fribourg Region	2 869	750	-73,9%	1 817	379	-79,1%	132	23	-82,6%	16 425	12 902	-21,4%
Geneva Region	21 277	7 702	-63,8%	9 179	1 421	-84,5%	1 487	423	-71,6%	48 027	27 940	-41,8%
Graubünden	11 763	8 144	-30,8%	131 391	34 300	-73,9%	4 351	20 450	+370,0%	512 330	568 431	+11,0%
Jura Trois Lacs	3 093	1 266	-59,1%	2 189	1 010	-53,9%	143	222	+55,2%	17 528	16 388	-6,5%
Lake Lucerne Region	4 243	1 910	-55,0%	23 139	7 521	-67,5%	748	958	+28,1%	135 950	144 961	+6,6%
Ticino	1 496	744	-50,3%	5 120	1 684	-67,1%	180	150	-16,7%	42 346	51 666	+22,0%
Valais Wallis	33 187	25 012	-24,6%	39 252	9 882	-74,8%	1 023	2 688	+162,8%	322 963	328 240	+1,6%
Waadt Region	24 100	9 240	-61,7%	7 556	1 407	-81,4%	1 061	172	-83,8%	102 361	74 128	-27,6%
Zurich Region	11 062	2 213	-80,0%	51 642	9 887	-80,9%	3 917	853	-78,2%	136 239	68 870	-49,4%
Grand Total	136 490	66 408	-51,3%	359 960	89 079	-75,3%	17 730	29 621	+67,1%	1 736 304	1 666 665	-4,0%
Big city	46 916	13 915	-70,3%	73 881	12 844	-82,6%	5 709	1 457	-74,5%	234 875	109 939	-53,2%
Small city	14 712	4 875	-66,9%	39 787	10 261	-74,2%	2 492	989	-60,3%	176 841	131 627	-25,6%
Countryside	7 399	2 814	-62,0%	25 290	8 622	-65,9%	2 678	751	-72,0%	109 683	97 539	-11,1%
Mountain	67 463	44 804	-33,6%	221 002	57 352	-74,0%	6 851	26 424	+285,7%	1 214 905	1 327 560	+9,3%
Grand Total	136 490	66 408	-51,3%	359 960	89 079	-75,3%	17 730	29 621	+67,1%	1 736 304	1 666 665	-4,0%

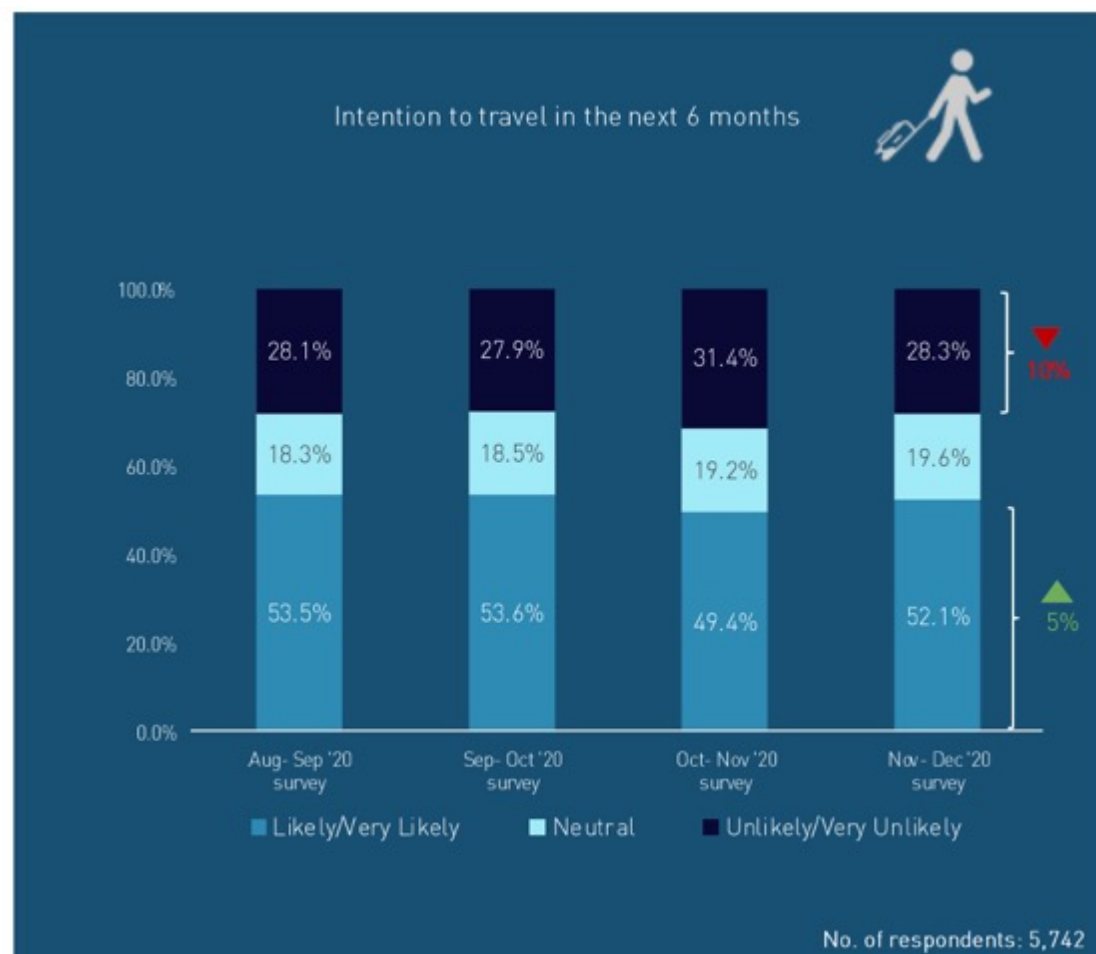


Poles are most likely to travel in the first half of 2021 amongst Europeans.

Top 5 markets which are most likely to travel in the next 6 months



Q7. Do you plan to take an overnight trip domestically or within Europe in the next 6 months, either for personal or professional purposes?

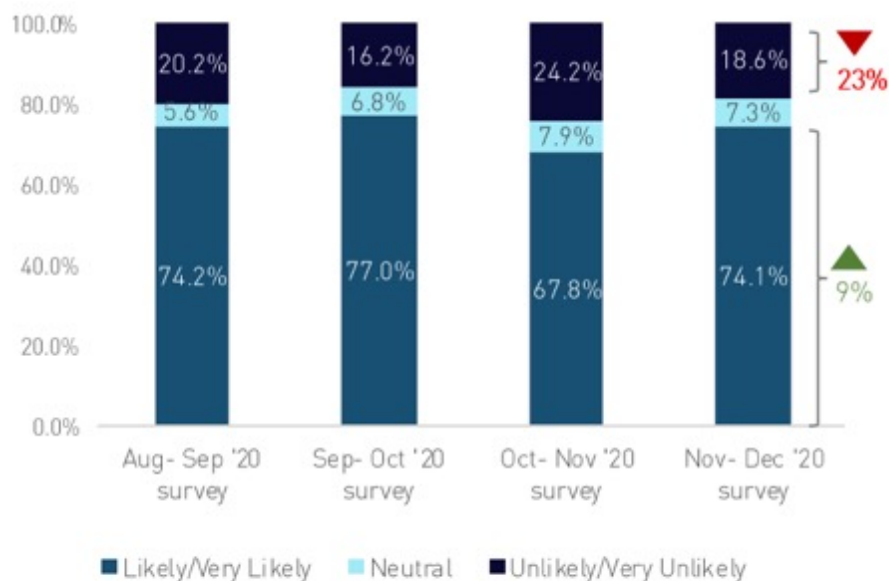


Source: Monitoring sentiment for domestic and intra-European travel, Jan 2021, European Travel Commission



3 out of 4 of Poles plan to travel in the first half of 2021.

Willingness to travel in the next 6 months



When will Poles travel?



Where will Poles travel within the next 6 months?



Source: Monitoring sentiment for domestic and intra-European travel, Jan 2021, European Travel Commission

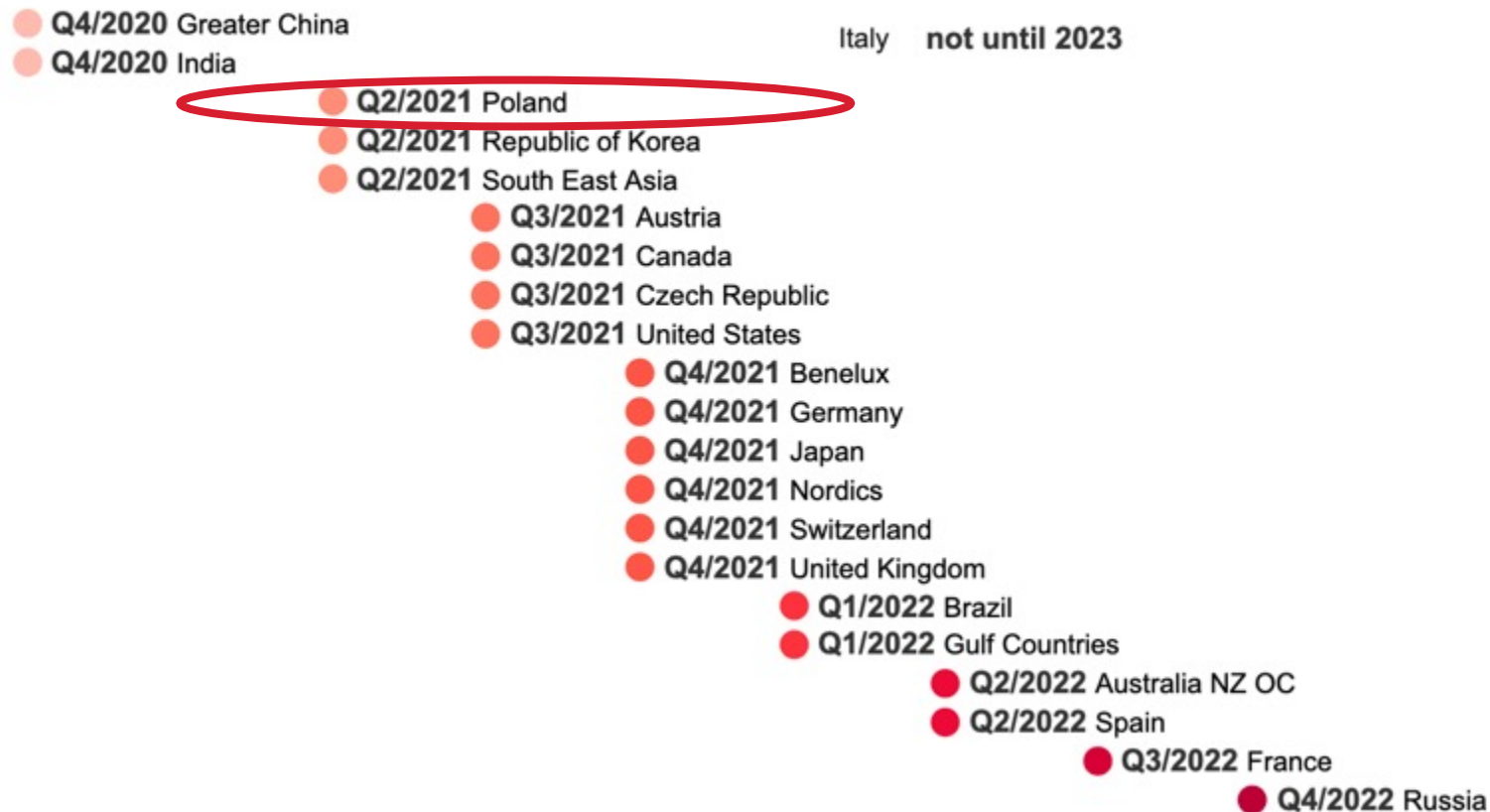


Poland on track to achieve the fastest economic recovery from Covid-19 in the EU.



Economic recovery: When is the GDP per capita back on a pre-corona level?

Source: Forecast Oxford Economics



A wide-angle landscape photograph of a mountain valley in Switzerland. The scene is dominated by a winding asphalt road that snakes through the valley, with a single dark car visible on a curve in the foreground. A river flows through the center of the valley, its path also winding. The mountains are covered in green and brown vegetation, with rocky outcrops visible on the right. The sky is filled with large, white, fluffy clouds. The overall atmosphere is serene and majestic.

Polish guests in Switzerland.

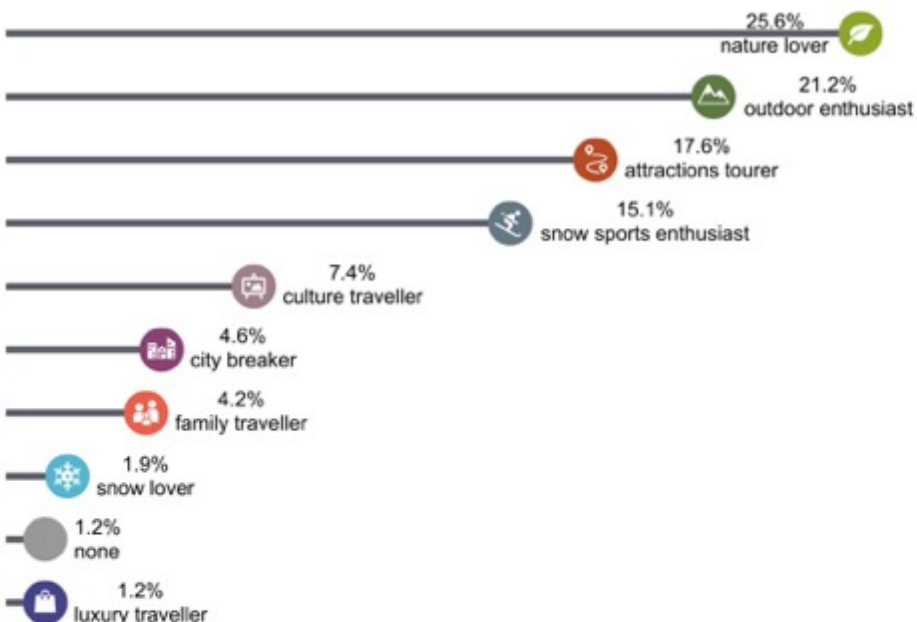


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How are Polish guests characterized?

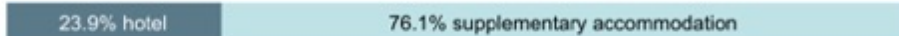


ST segments (please select by clicking on the icon)



Travel behaviour

Accommodation type



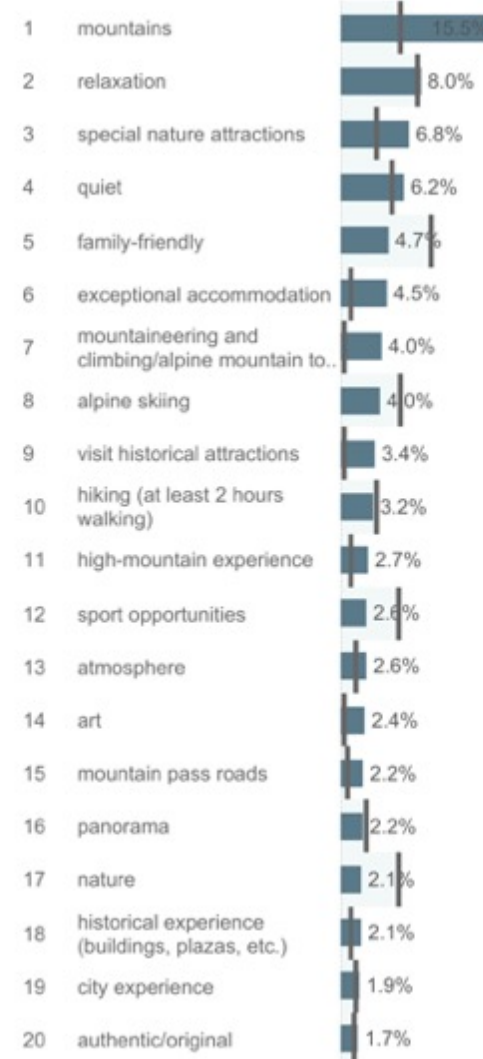
Means of transportation



Touring



Top 20 main travel reasons



Select ST market

Switzerland	56.8%
Germany	12.5%
Benelux	4.9%
Other (non-ST mark..	3.7%
North America	3.5%
United Kingdom	3.0%
France	2.8%
Greater China	2.4%
Italy	1.9%
South East Asia	1.2%
India	1.1%
Nordics	0.8%
Spain	0.8%
Republic of Korea	0.7%
Austria	0.6%
Australia/NZ/OC	0.6%
Brazil	0.5%
Gulf Countries	0.5%
Russia	0.5%
Czech Republic	0.5%
Japan	0.4%
Poland	0.4%

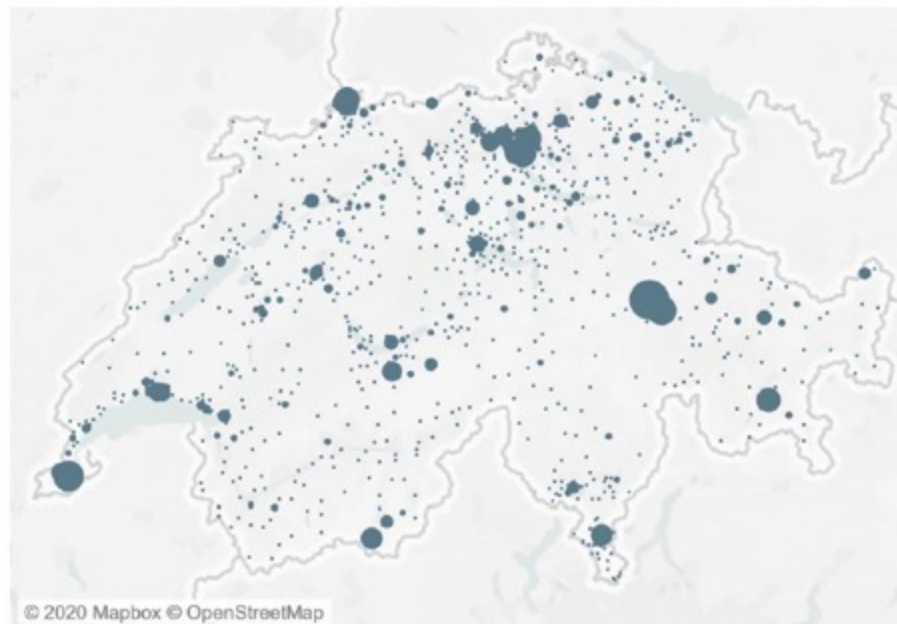
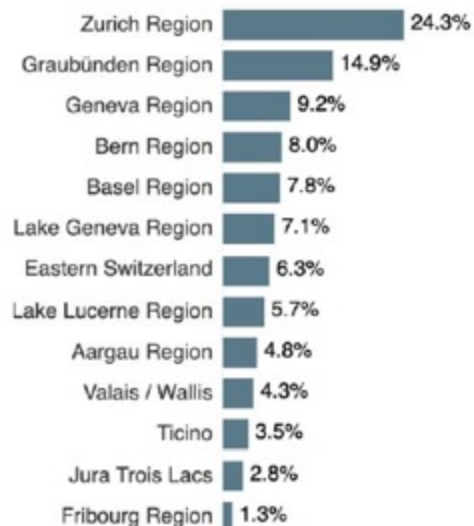
Or select a single market:
Poland



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Where did Polish guests travel to in 2019?

Tourism regions



Tourism zones

39.9%
Big City

19.0%
Small City

14.2%
Countryside

26.9%
Mountain

Top 10 destinations

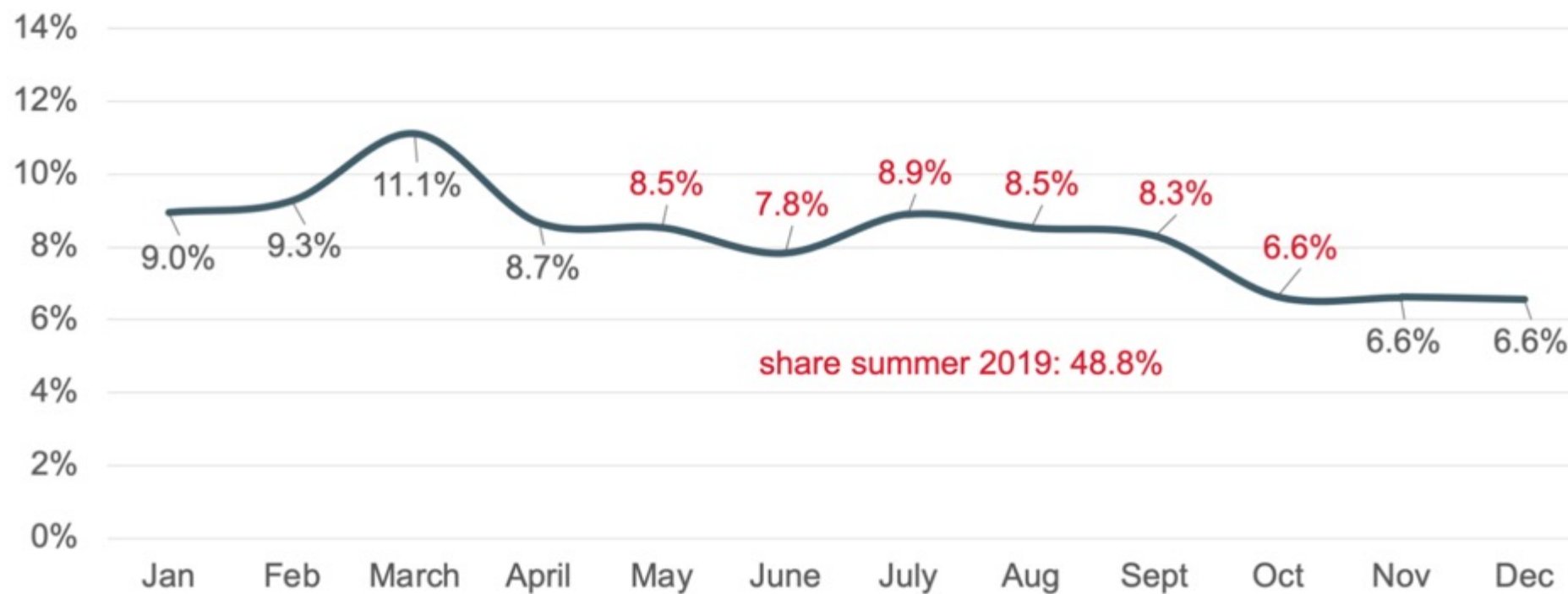


Source: ST research report on Poland with 2019 data



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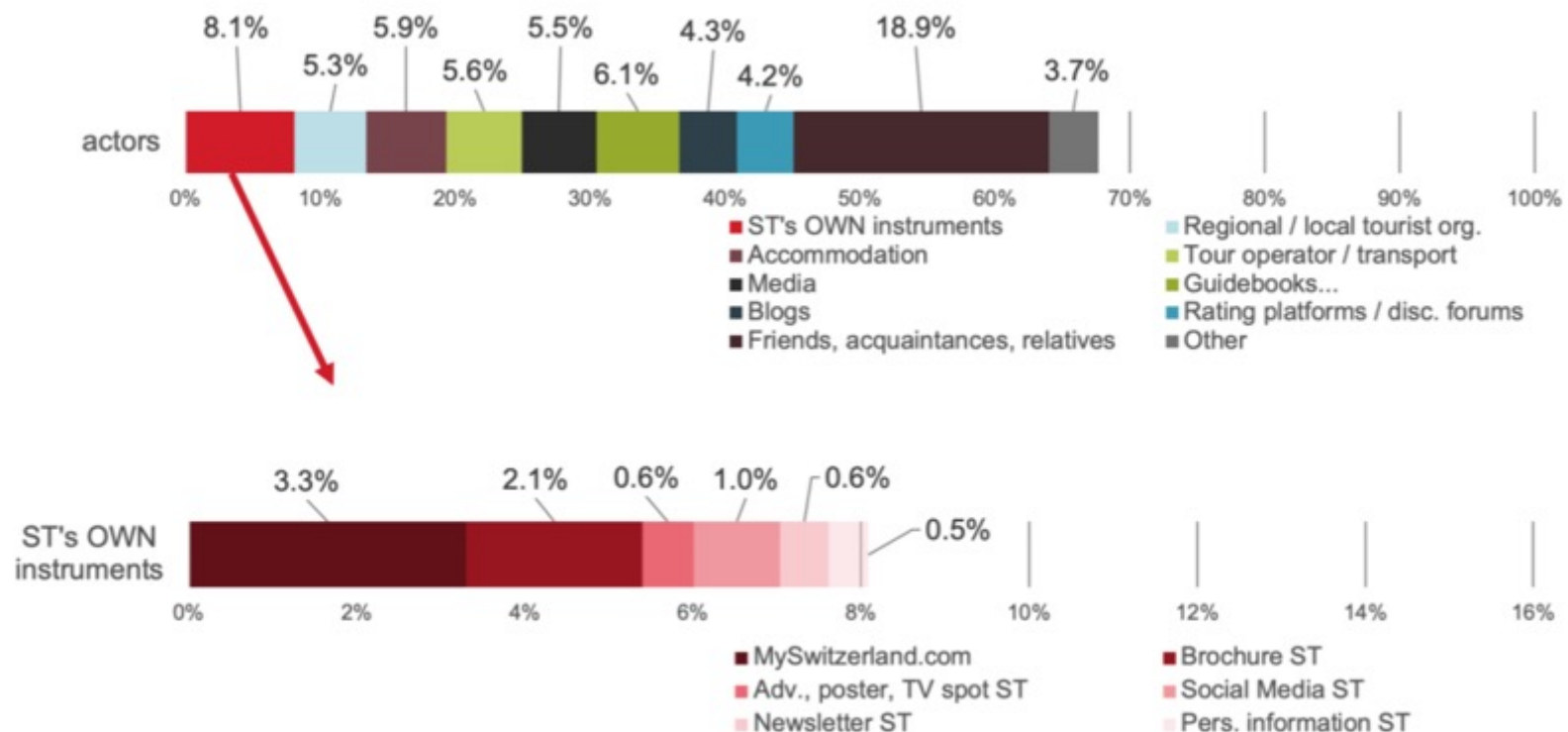
When do Polish guests travel?





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How are Polish travelers influenced externally in their travel decision?









The *total* ST influence (including ST contributions to instruments like media, tour operator...) is **20.2%**.
source: TMS 2017



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Our segments for the Polish market.

Summer	 Nature Lover <ul style="list-style-type: none">▪ Ecotourist▪ Typically Swiss Romantic	 Outdoor Enthusiast <ul style="list-style-type: none">▪ Hiker▪ Biker & Cyclist	 Attractions Tourer <ul style="list-style-type: none">▪ Attractions, History & Heritage Explorer			
Winter		 Snow Sports Enthusiast <ul style="list-style-type: none">▪ Skier▪ Free Rider▪ Cross-country Skier				
Cities	 City Breaker <ul style="list-style-type: none">▪ Urban Lifestyle Seeker▪ Sightseer					
Meetings			 Incentive Planner <ul style="list-style-type: none">▪ Marketing Executive▪ Agency Account Manager			



Our strategy. Our projects.



Polish guests value sustainable travel.

Sustainable Travel Index Rankings 2020

	Rank 2020
Sweden	1
Finland	2
Austria	3
Estonia	4
Norway	5
Slovakia	6
Iceland	7
Latvia	8
France	9
Slovenia	10
Switzerland	11
Lithuania	12
Croatia	13
Czech Republic	14
Ireland	15
Germany	16
Belgium	17
Denmark	18
Netherlands	19
Portugal	20
Poland	21

- According to Euromonitor's *Sustainable Travel Index Rankings 2020*, Poland ranks 10 spots behind Switzerland as a sustainable travel destination.
- As nature lovers and outdoor enthusiasts who travel to Switzerland for the mountains, Polish guests value sustainable travel (while remaining highly attached to their cars, though).
- This is why Switzerland Tourism will launch the #Swisstainable campaign as a further Swiss differentiator on the Polish market this year.



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Our Strategy for 2021-2022.

1. Sustainability, GToS, InS in focus
2. Short, attractive, dynamic, live, modern, targeted – we draw attention
3. We are especially focusing on women
4. Partnerships with media focused on outdoor, food, life style, touring
5. Focus on SoMe influencers (bloggers, YT, instagramers)
6. Non touristic partnerships: trampoline park, Ricola, others
7. Trade: targeted support development for our segments
8. Budget: Summer - 60%, Winter – 30%, Cities – 10%





KAM – back to Switzerland.

1. Bringing guests back to Switzerland for diverse experience, also according to the market partners' needs - GToS, scenic train rides, best of the mountains trips, winter fun.
2. Joint marketing campaigns with TOs bringing most guests to Switzerland in Summer and Winter (e.g. Itaka, Logostour, Feel the Flow, Taksidi, Funclub, Zero Gravity, Interhome).
3. Mix of marketing activities B2B and B2C: online, Social Media, print, media/influencers, sales channels.
4. Obligatory integration of ST messages - InS, #, films, key visuals.



KMM – influencer’s projects.

1. Diverse group and individual project with reliable influencers, e.g.:
 - Weekend meeting with travel bloggers living in Switzerland, encourage to travel.
 - Outdoor Women Adventure with different hiking and biking trails, various regions and our iconic hiking trails and bike routes.
 - Switzerland Diverse, different segments, meet for the first day together in hosting region then will go for 3 days to different parts of Switzerland for various activities (outdoor, GToS, GTToS, campings, cities with mountain day trips etc.).
 - Tasty Switzerland – culinary/travel/lifestyle bloggers discover Swiss Autumn.
 - Autumn nature with photographers, Trailrunning with the experts and non experts.
2. Individual projects according to our segments and needs.
3. Fees incl. own promotion of influencers in their SoMe to their target groups.

Swisstainable.



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1. 360° project with NGTraveler with print, online, SoMe and invited influencers.
2. Focus not only on nature and outdoor activities but also on responsible travel, eco-friendly transport, smart cities, local traditions and slow food.
3. We want to inspire an eco-aware and sensitive audience while presenting them travel, adventure and photography experiences by the best influencers.
4. Integration of the partner with all relevant activities incl. media/influencer trips.





What works in our market?

1. Message for individuals – print, events, influencers, recommendations
2. Flexibility and creativeness – last minute changes possible
3. Allotments for tour operators – whole residences in low season
4. Mountains, culture, trains, touring and active holiday – from ski to bike
5. Our segments!!!



Why invest in Poland?

- **Large market: 38 mln** inhabitants, of which 21% plan their holidays abroad
- **Fastest economic recovery from COVID-19** amongst EU countries and great economic growth prospects for the next years
- **Switzerland is a top choice destination:** +71% hotel ON in the last decade (no other European source market grew as strongly as Poland)
- **Polish guests traveling to Switzerland are young** (53% are under 35 years old), they love mountains and touring



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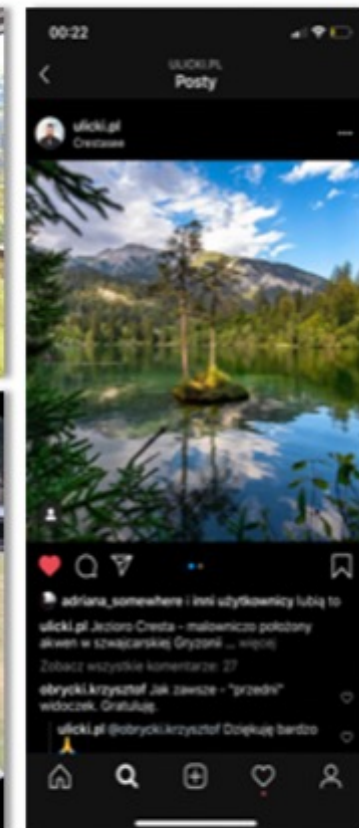
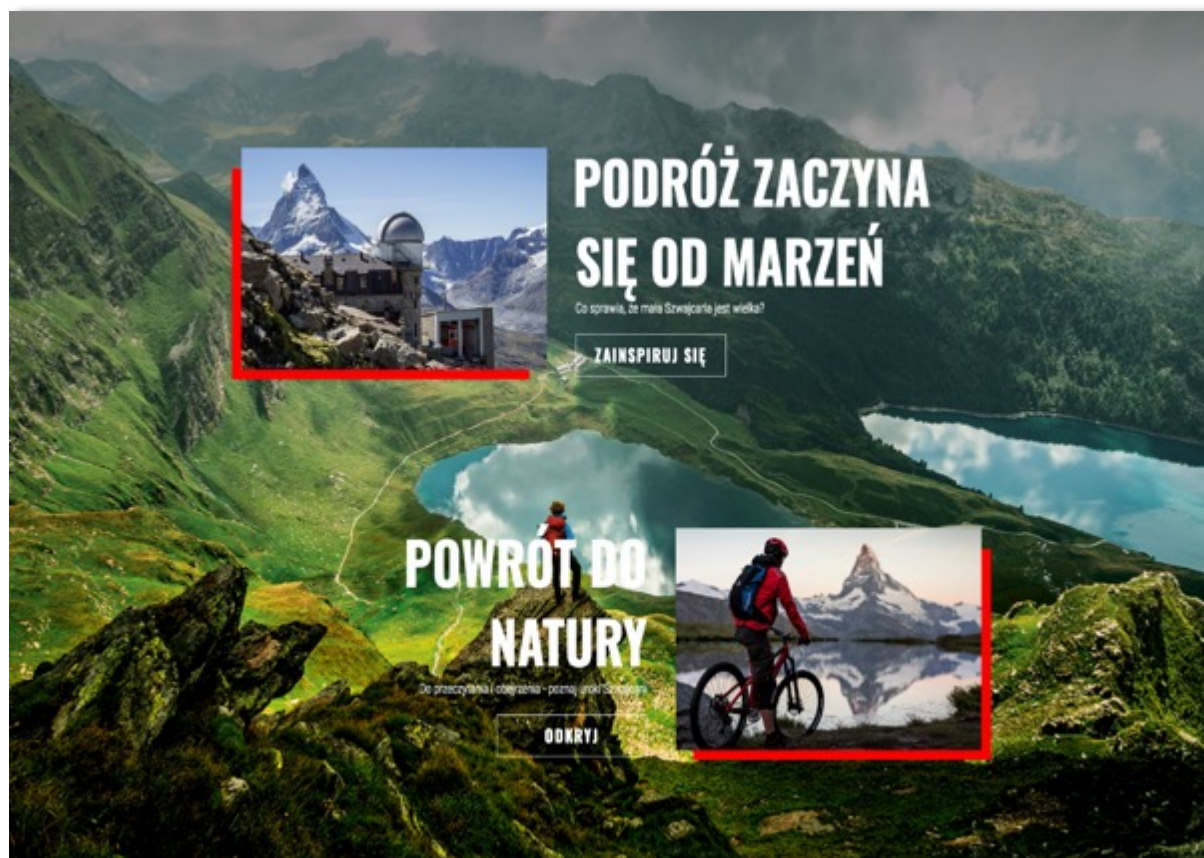
Become our market partner!

- Packages starting from CHF 3'000
- Mix of diverse activities, print, online, events, trade
- Focus on your segments
- Main campaign & individual for you organized activities
- **We invest 20% on top of the price of your package in the project**



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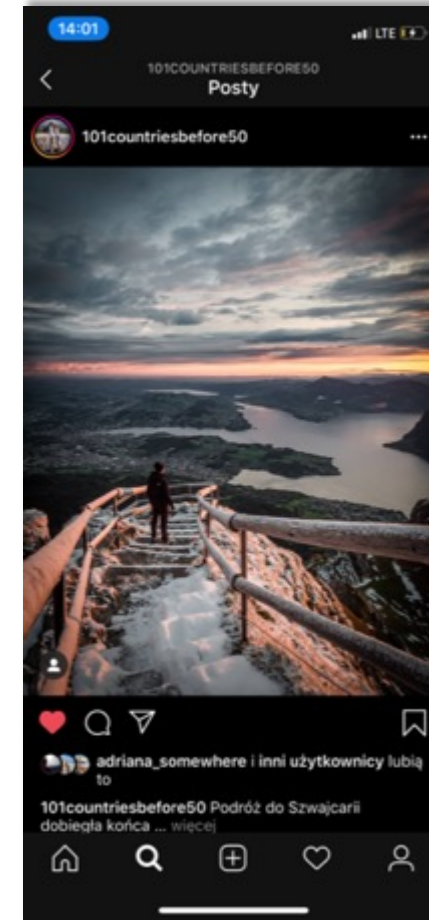
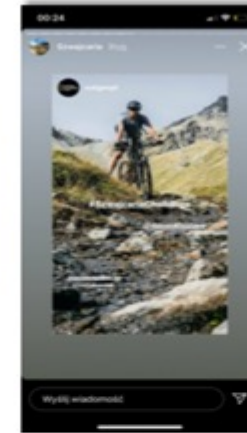
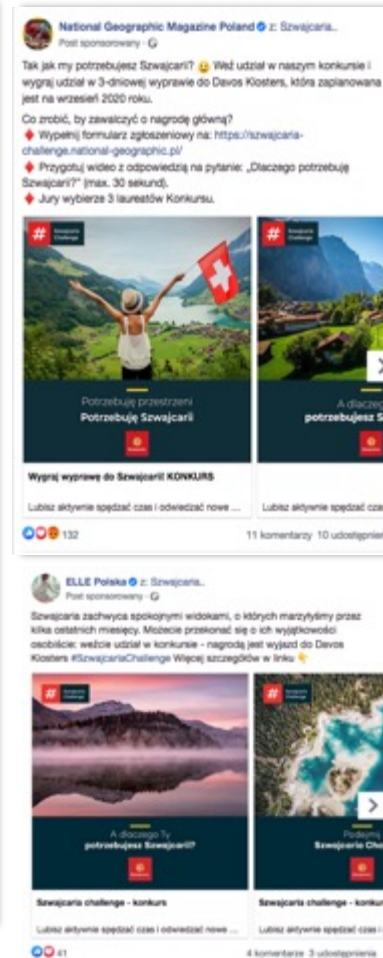
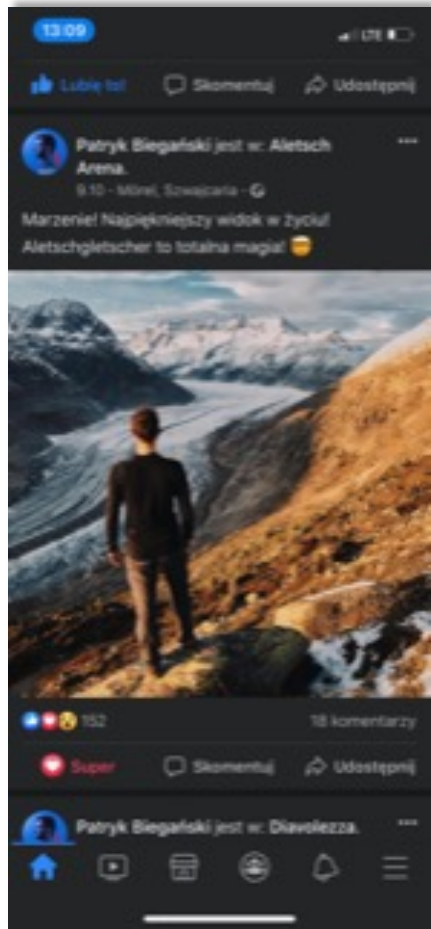
Our campaigns. Gazeta.pl, wyborcza.pl



Our campaigns. NGT, photoprojects.



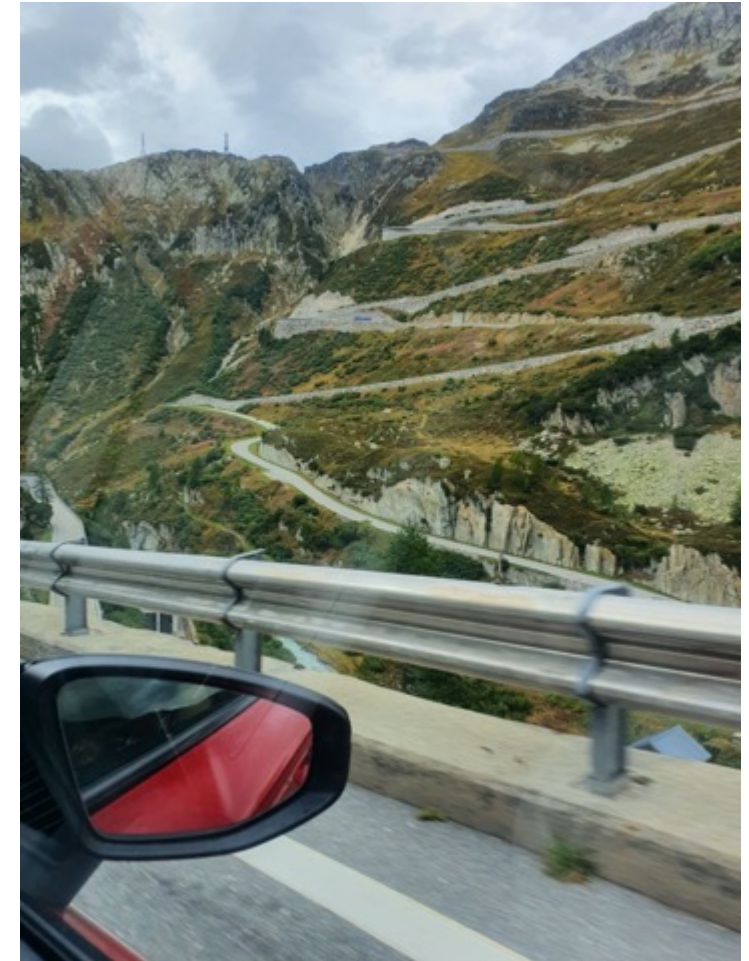
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Our projects. Fam & media trips.



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Swiss Embassy in Warsaw.





Questions?

Reach out to adriana.czupryn@switzerland.com or
marta.piechota@switzerland.com

Danke. Merci. Grazie. Grazia.
Dziękujemy.



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