

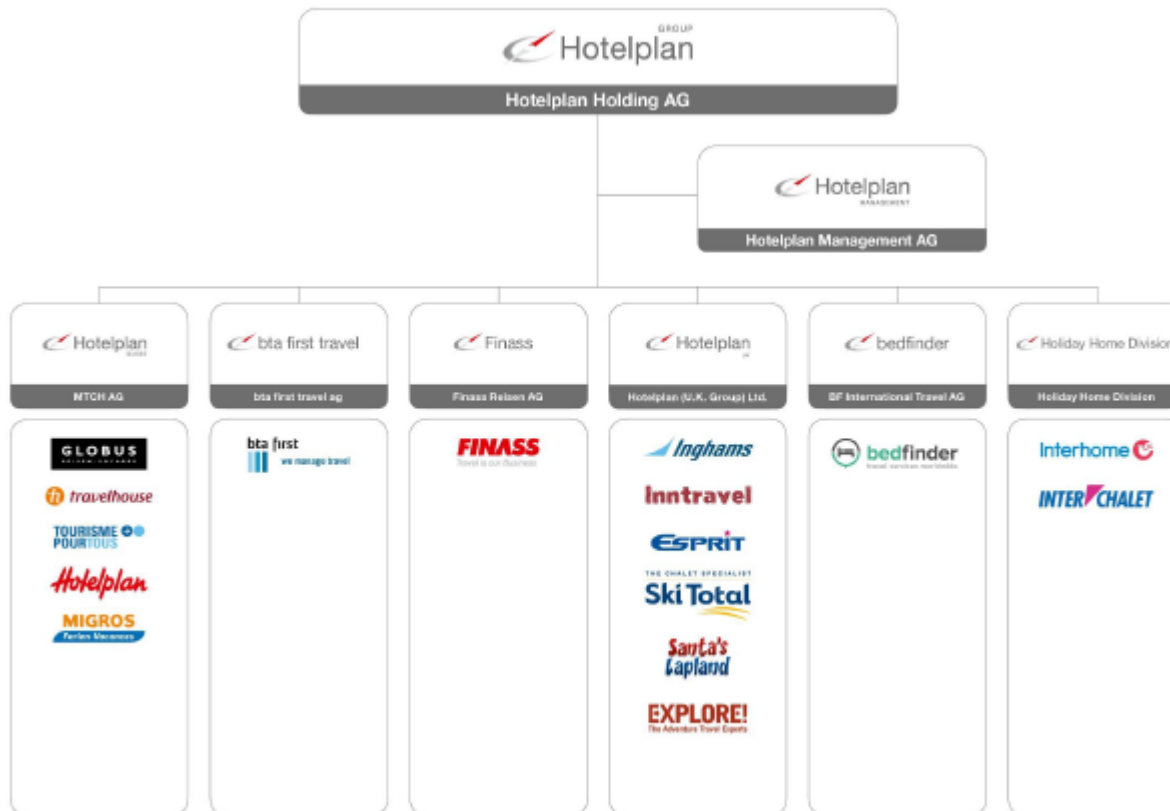
Insights from Switzerland

Pino Andreano
Head Northern Europe & East

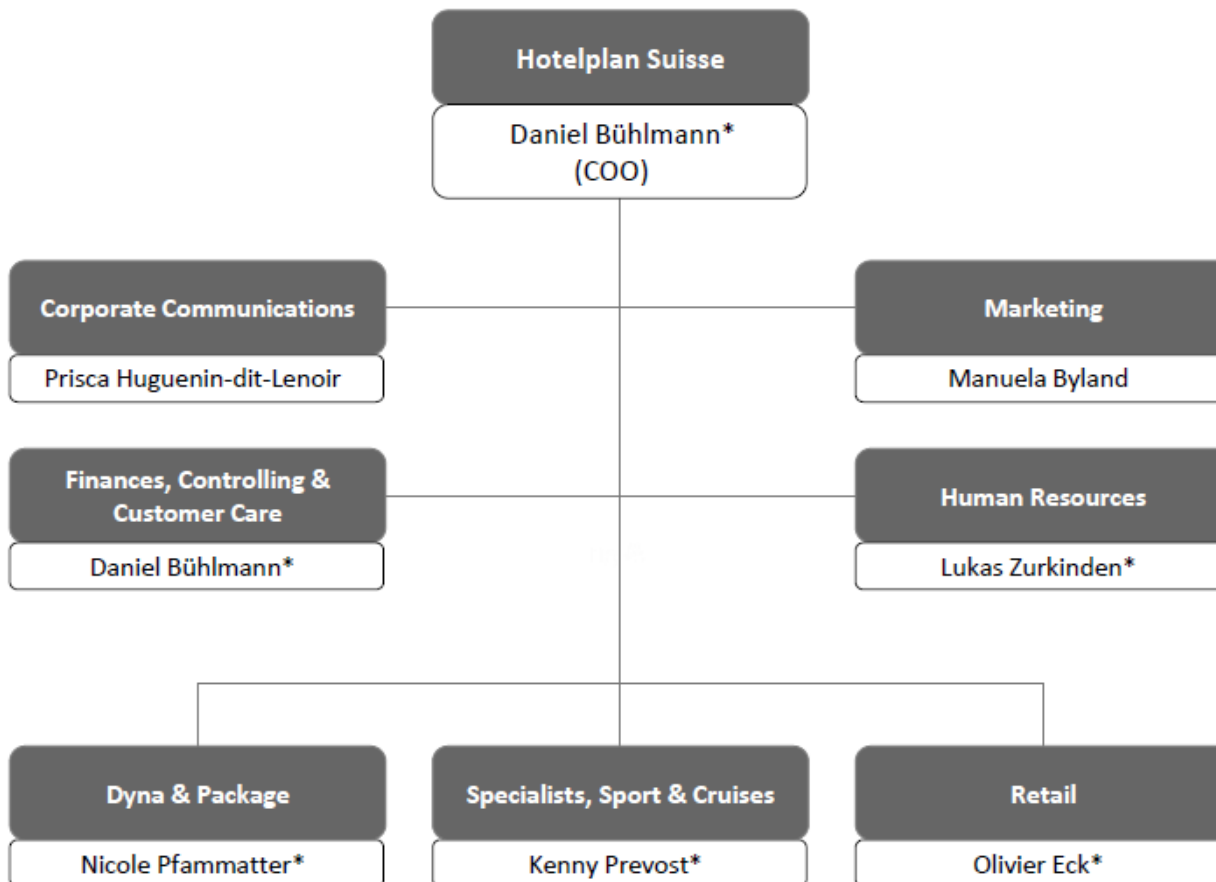
Summary

- ✓ **Hotelplan Suisse**
- ✓ **Switzerland**
- ✓ **The Swiss outgoing travel industry leisure**
- ✓ **Travel behaviour of Swiss residents**
- ✓ **Booking behaviour of Swiss residents**
- ✓ **Target groups of Hotelplan Suisse**
- ✓ **Expectations and Challenges**
- ✓ **Ruka/Kuusamo an example**

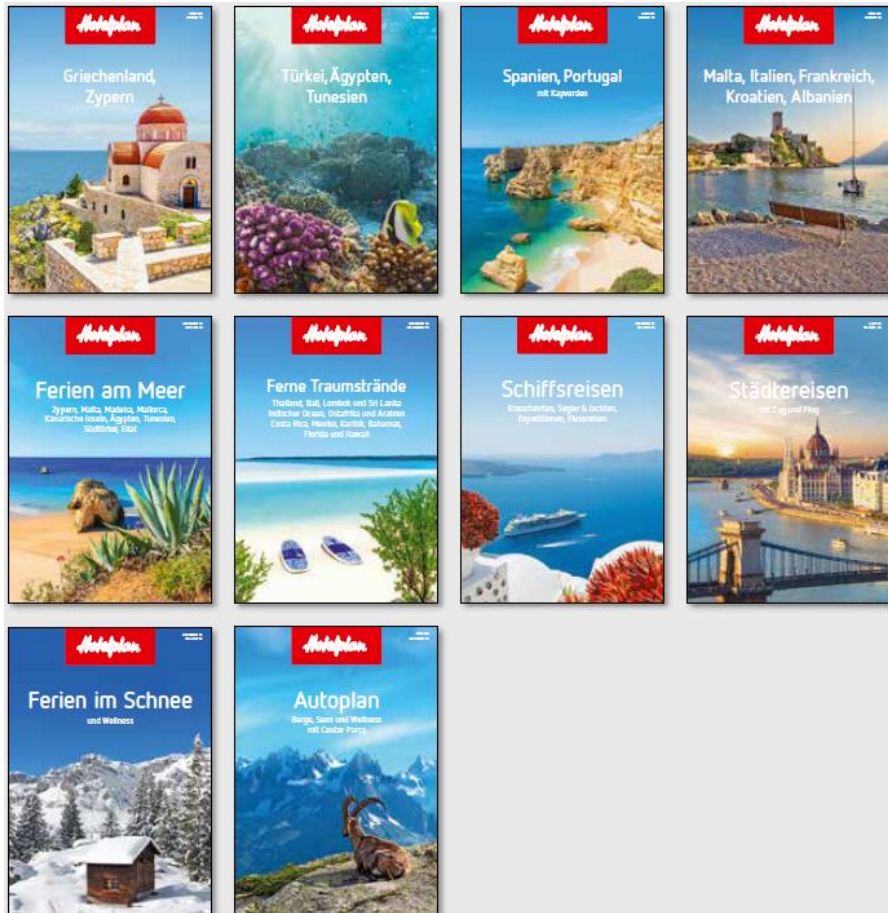
Hotelplan Suisse



Hotelplan Suisse

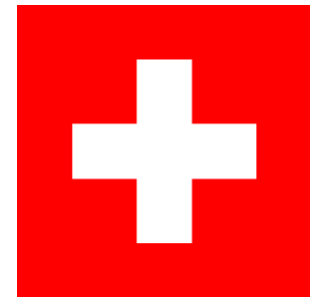


Hotelplan Suisse



gedruckt in der schweiz

Geography Switzerland



Switzerland

Capital:	Bern
Largest City:	Zürich
Official Languages:	German, French, Italian, Romansh
Area:	41,285 km ²
Population:	8'508'898 (estimated 2018)
Currency:	CHF
GDP PPP:	\$ 551 billion, per capita \$ 64'988

Important to remember:

- Small population compared to other european countries
- Multi-Lingual
- Average income high compared to other DACH-Countries

The Swiss outgoing travel industry leisure

Tour operator:

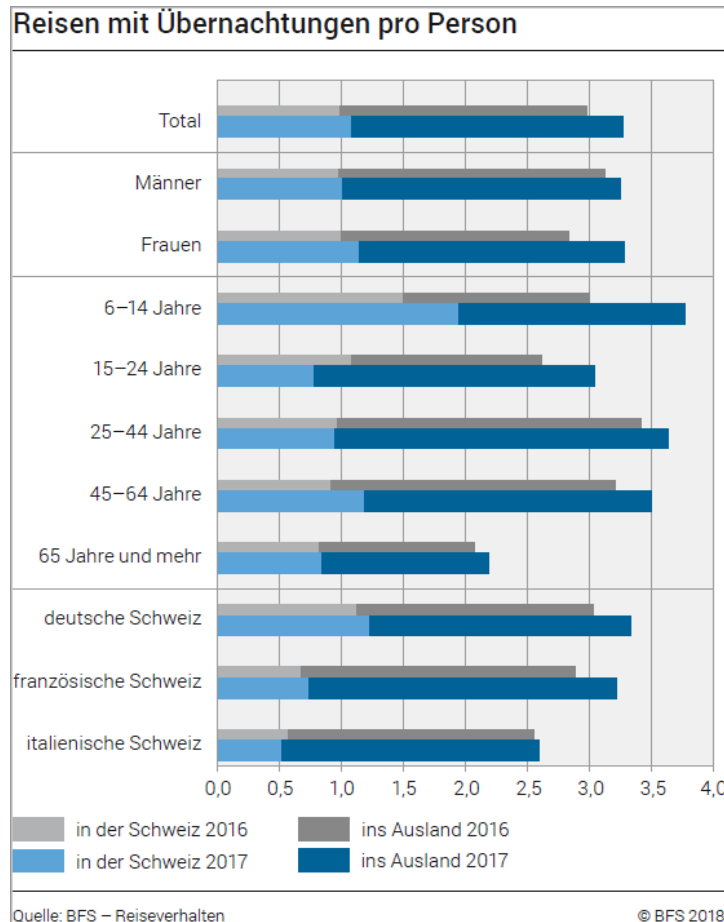
- Produces own packaged tours with or without charter flights
- Prints Brochures, Flyer or distributes on the own Websites
- Cooperates at destination directly with suppliers, via DMC's or/and own Agency at the destination
- Distribution via own agencies, independent agencies and online
- Main tour operators in Switzerland are:
 - Hotelplan Suisse (Hotelplan, Travelhouse, Migros Ferien, Globus Reisen, TPT)
 - DER Touristik Suisse AG (Kuoni, Helvetic Tours, several specialists)
 - TUI Suisse Ltd. (TUI, Airtours)
 - Knecht Reisegruppe (several brands ex. Knecht Reisen, Glur Reisen, Kira Reisen)
 - Globetrotter Group AG
 - IST Coop Travel

The Swiss outgoing travel industry leisure

Retailer:

- Number of Agencies in 2018: **1656** (in 2008: 2500)
- Average number of employes per agency in 2017: 3.4
- Tour operator own agencies
- Cooperation models like TTS Travel Trade Service Ltd. or twd AG
- Independent agencies with and without own small tour operating
- Franchise models
- Commission level: 10 – 15%
- Their suppliers are:
 - Tour operators
 - Bedbanks
 - Direct with suppliers at the destination

Travel behaviour – Number of trips



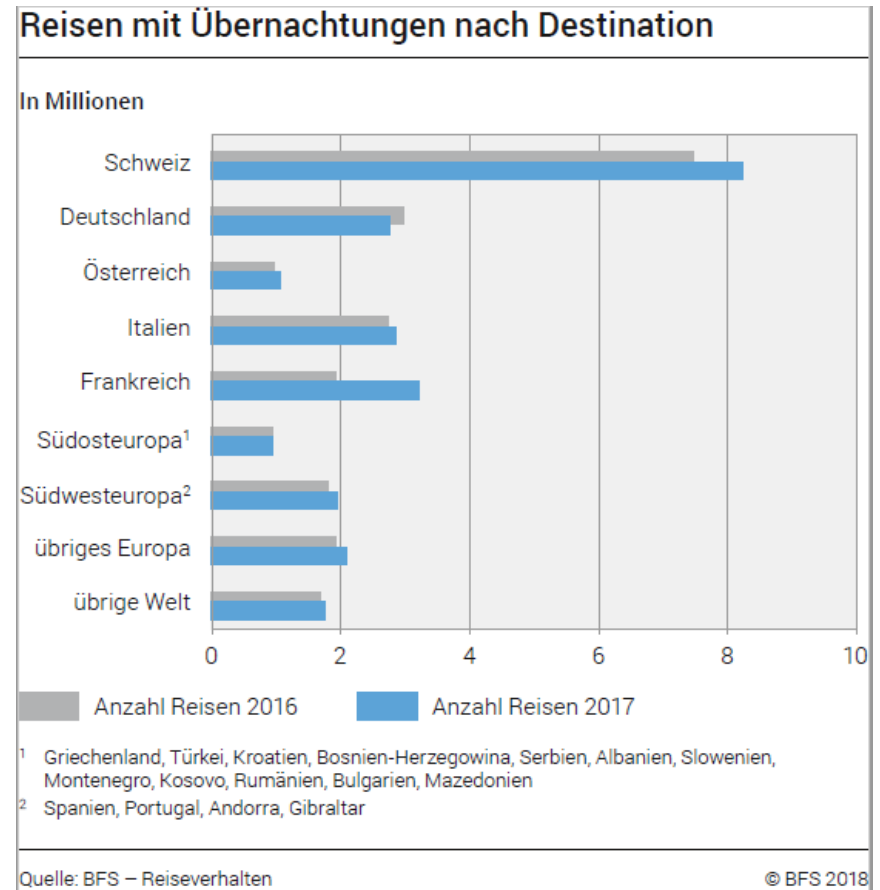
Trips with at least 1 Overnight

- 90.1% of the population travelled at least once in 2017
- Total trips with overnight 24.9 Mio.
- Average 3.3 trips per person
- Increase of 10% compared to 2016
- People from 65 years old travel less with 2.2 travel per year
- Split per language:
 - German speaking: 3.3
 - French speaking: 3.2
 - Italian speaking: 2.6

Travel behaviour - Destination

Trips with overnights by destination

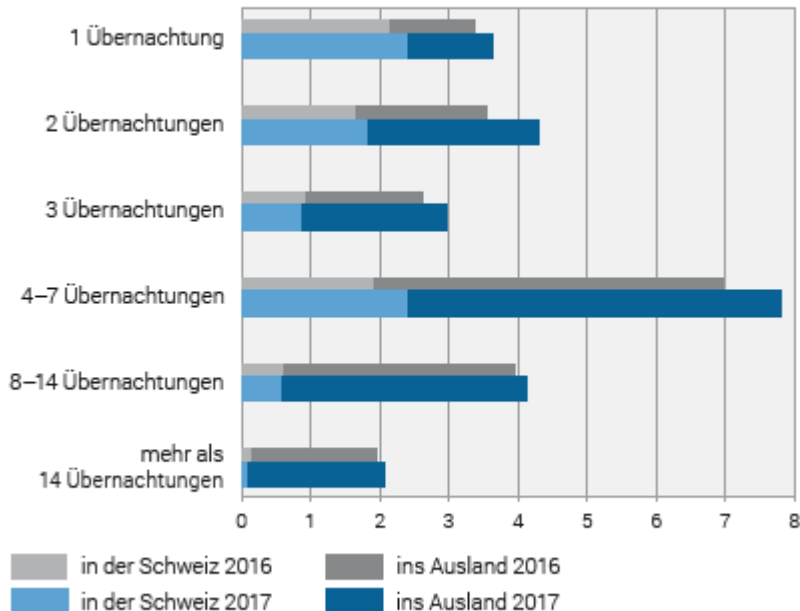
- 33% within Switzerland
- 40% in neighbouring countries
- 20% in other european countries
- 7% outside an european country



Travel behaviour – Duration

Reisen mit Übernachtungen nach Reisedauer **G4**

In Millionen

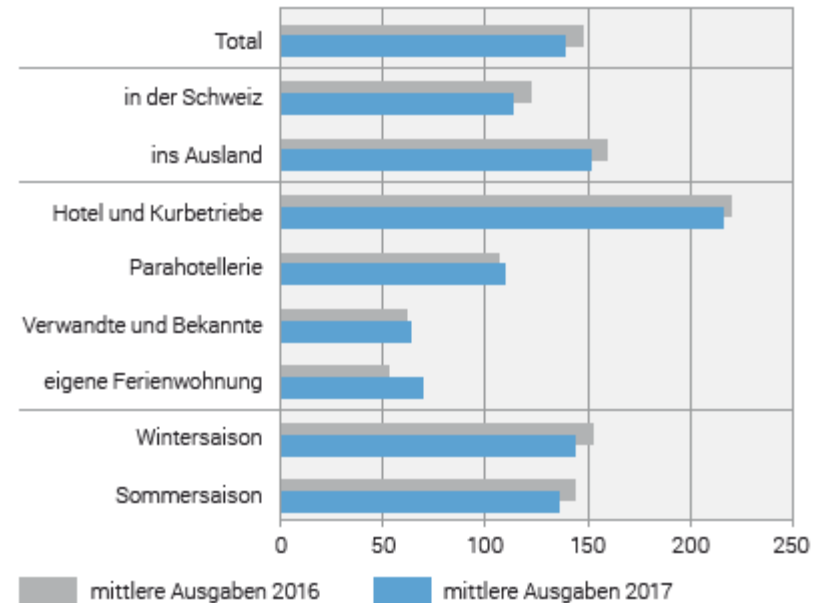


Quelle: BFS – Reiseverhalten

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Mittlere Tagesausgaben in Franken pro Person für Privatreisen mit Übernachtungen **G8**

In CHF



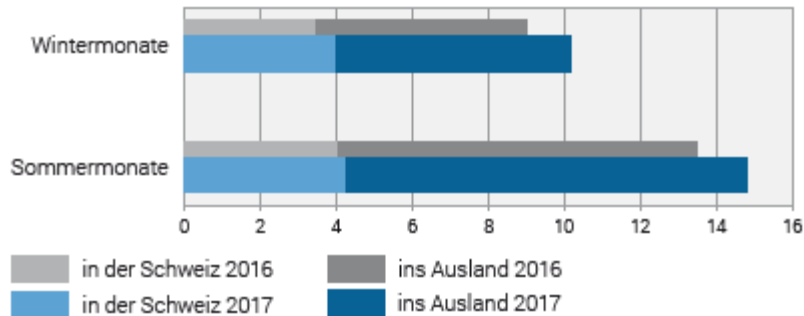
Quelle: BFS – Reiseverhalten

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Travel behaviour - Seasonality

Reisen mit Übernachtungen nach Saison G5

In Millionen

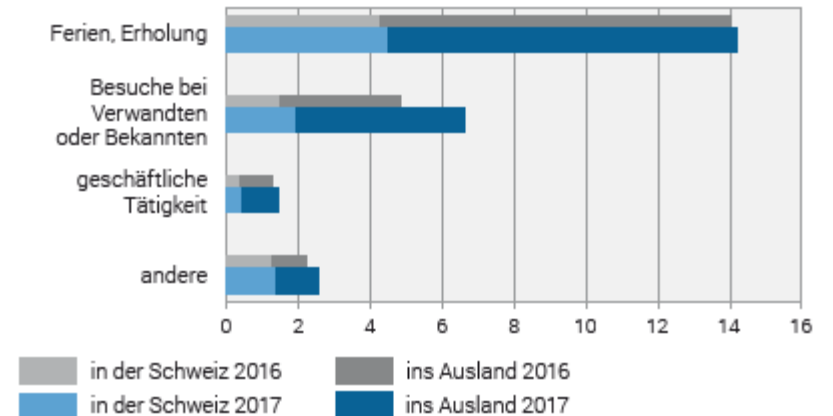


Quelle: BFS – Reiseverhalten

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Reisen mit Übernachtungen nach Reisezweck G3

In Millionen



Quelle: BFS – Reiseverhalten

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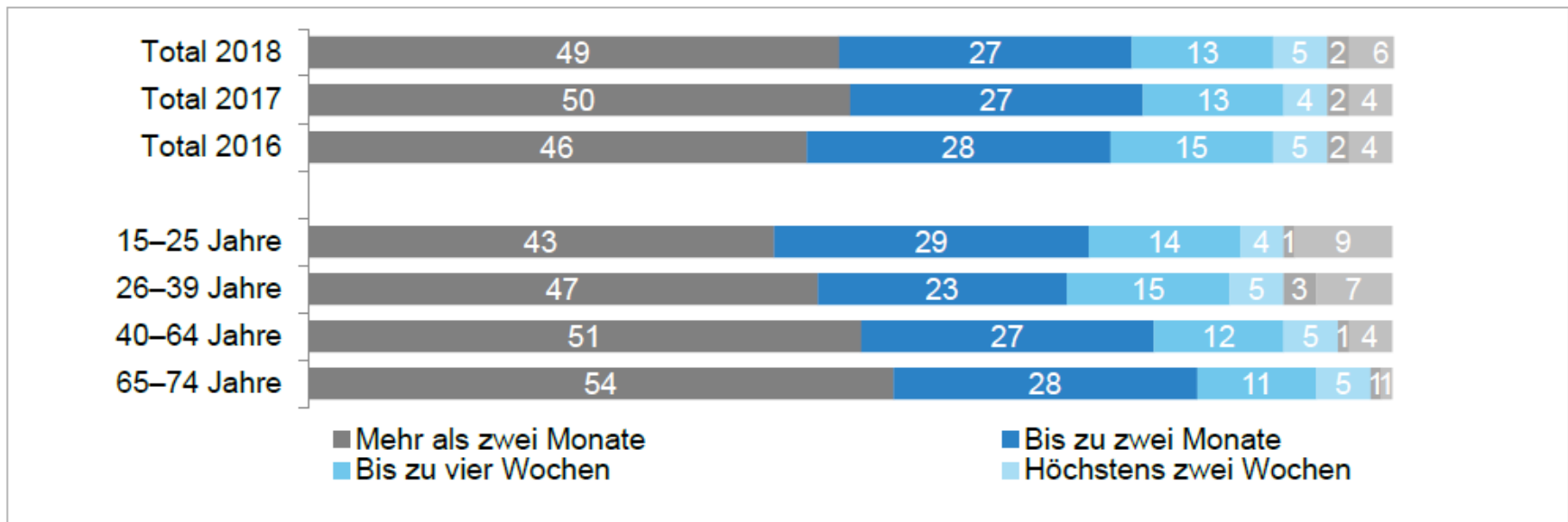
Travel behaviour by the Swiss resident population

Summary:

- 90.1% of the population travelled at least once in 2017
- Total trips with overnight 24.9 Mio.
- Average 3.3 trips per person; Increase of 10% compared to 2016
- Over 2 Mio. trips to northern europe in 2017
- When travelling abroad the expenditure rises to CHF 152 per day.
- The expenditure when clients are staying in a hotel CHF 216 per day
- 59% of the trips take place in Summer May till October.
- Holiday and Relax is the major travel reason with 57%
- 68% of it are trips abroad

Booking behaviour Swiss resident population

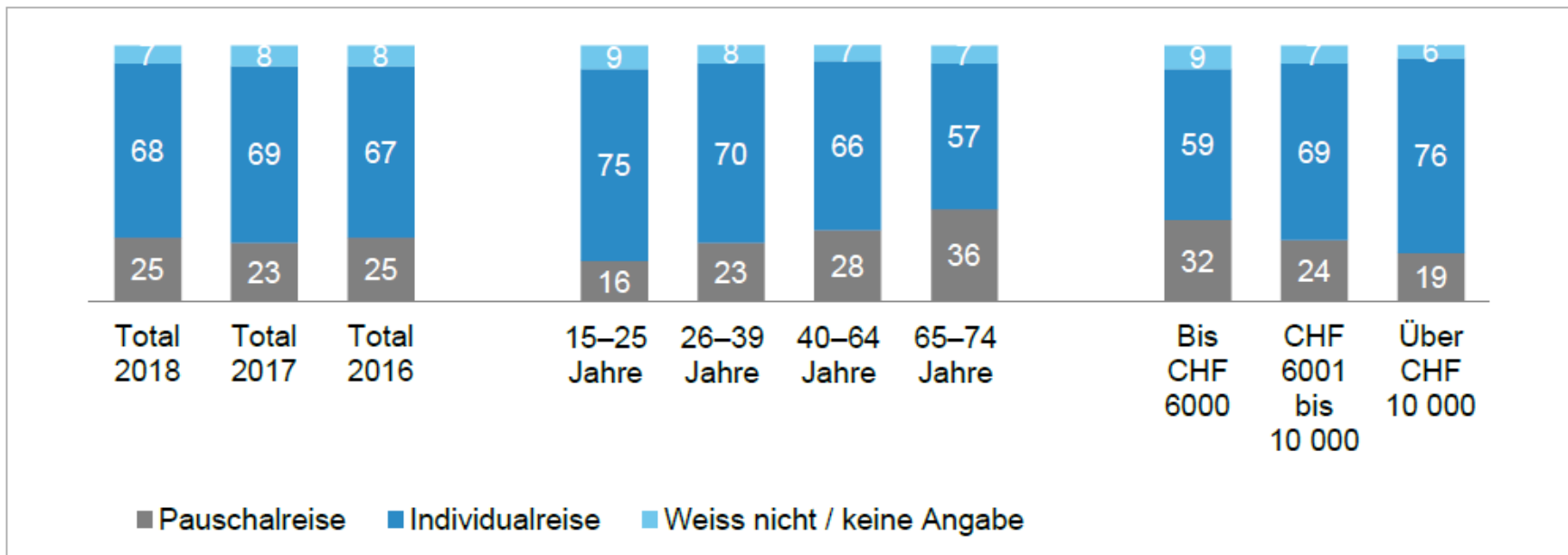
How much in advance do Swiss book their holiday?



Source: Buchungs- und Reiseverhalten © Copyright Allianz Partners Schweiz

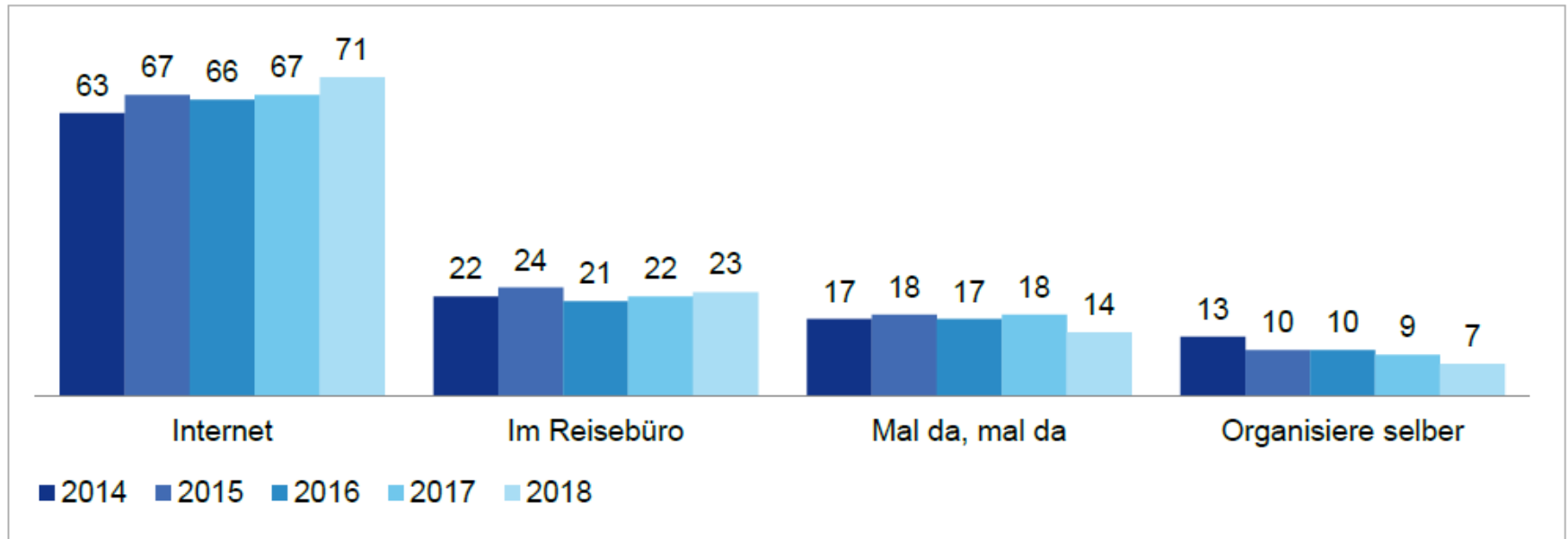
Booking behaviour Swiss resident population

Which booking type do they prefer?



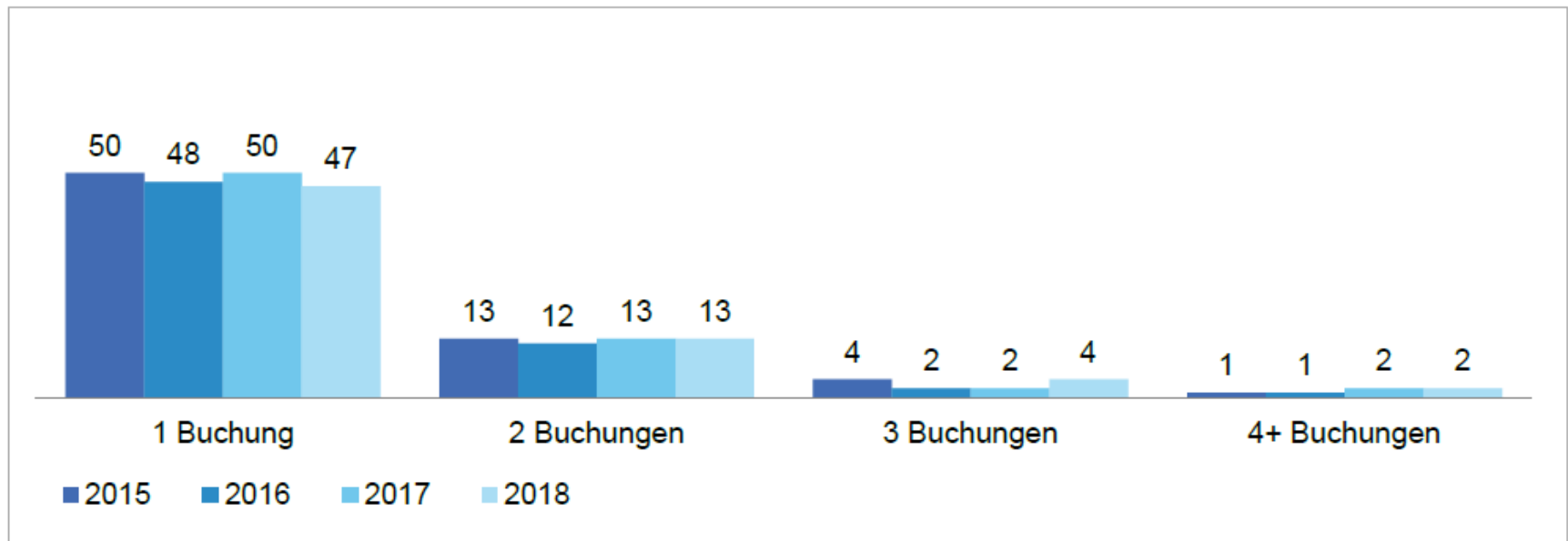
Booking behaviour Swiss resident population

Where do they book their holidays?



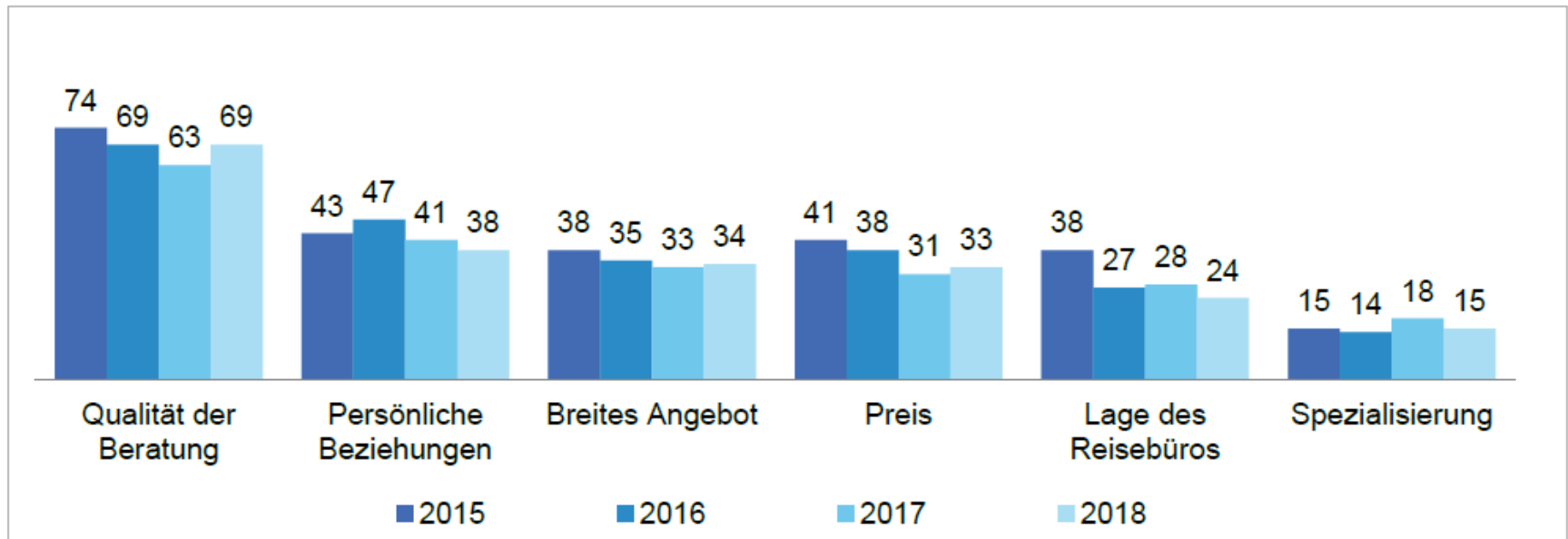
Booking behaviour Swiss resident population

How many times do they book a trip in a travel agency?



Booking behaviour Swiss resident population

Why do they book in a travel agency?



Booking behaviour Swiss resident population

Summary:

- The percentage of early booker is stable at 49% (2+ month before travelling)
- The booking channels are stable: Internet and Travel agency are the preferred booking channels
- Individual travel is a trend: 68% wish to book an tailor-made package
- Almost every second Swiss resident books at least once per year in a travel agency
- 69% Quality of know how, advices, consultancy

Target groups – Best Agers

Best Agers:

Clients of Hotelplan Suisse 50+

- The majority (34%) of «Best Agers» book more than 180 days in advance
- «Best Agers» prefer to book offline: 87% offline, 13% online
- The holiday budget is higher than the average client: CHF 1385 / CHF 1050
- Almost 50% of «Best Agers» are between 50-59 years old



Target group - Families

Families:

2 adults with at least with 1 child up to 16 years old

- The majority (36%) of «Familie» with children in education book more than 180 days in advance
- Holiday budget per family:
 - 2 adults + 1 child 2-12 yo CHF 2'560
 - 2 adults + 1 child 12-16 yo CHF 3'083
- 49% of families travel with 1 child; 42% of families travel with 2 children



Target group - Youngsters

Youngsters:

Clients of Hotelplan Suisse up to 40

- Youngsters book on a shorter term:
30-60 days before departure
- Booking channel:
64% offline, 36% online
- Holiday budget per age range:
 - 18-24 years old CHF 1'120
 - 25-29 years old CHF 1'275
 - 30-34 years old CHF 1'380
 - 35-39 years old CHF 1'439
 - 40+ years old CHF 1'550
 - 2 adults + 1 child 12-16 yo CHF 3'083
- Highest travel activity 25-29 years old



Overall Expectations

- Know how
- Availability
- Speed
- Price
- Additional information
- Personal approach
- Price
- Safety

Our challenges:

Flexibility, Creativity, Communication, Customer oriented, Customer service, Profitability

Our personal Experience with Ruka/Kuusamo



RUKA/KUUSAMO

Ruka bietet wahre Winterfreuden. Tauchen Sie ein in diese traumhafte Schneewelt und toben Sie sich tagsüber auf den Pisten beim Ski Alpin oder Langlauf aus oder entdecken Sie die Umgebung bei faszinierenden Ausflügen mit Huskys und Rentieren. Entspannen Sie sich abends in der Sauna oder lassen Sie sich von den atemberaubenden Nordlichtern verzaubern. Kuusamo ist nur 30 Fahrminuten entfernt und kann gut mit dem Skibus erreicht werden.



