Strategy Destination Gstaad 2021 - 2024





Introduction

The destination of Gstaad is in an excellent starting position for tourism and regional development. However, only with **focus and consensus** can successful long-term future be shaped.

The destination strategy provides **the basis** for **the development of tourism** and is thus a key component in a **location development strategy**.

The destination of Gstaad includes the communes of Saanen, Gsteig, Lauenen and Zweisimmen.

INTENT

Gstaad Saanenland Tourism, together with the signatory institutions of the destination, has developed this long-term destination strategy and agreed on a coordinated action plan.

The partners involved agree to be guided by the following premises:

Long-term view • Mutual respect • Willingness to cooperate

IMPLEMENTATION

The responsibility for implementing the projects listed in this strategy lies with the institutions designated as leads. Gstaad Saanenland Tourism, as the driving force behind the development of the destination, must monitor, support and, if necessary, initiate the implementation process.

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Our vision

The Destination Gstaad is the leading **Alpine destination for enjoyment**.

Our mission

In the Destination Gstaad, visitors enjoy **friendly**, **hospitality Alpine lifestyle**, active **recreation** and **discretion**.

Beacons with **international appeal** as well as small, **fine offers** are responsibly developed with a healthy mix of **tradition and innovation**.

Our positioning

Alpine authenticity: we maintain regional traditions and an affinity to nature and offer unique mountain experiences.

Indulgence and added value: we celebrate indulgence, well-being and hospitality, offer visitors added value wherever possible and make things easy and pleasant for visitors.

Culture and sport: the regional and international cultural and sporting events develop into mainstays and enhance the visitor experience in all seasons.

Unwind: we will preserve "the last paradise in a crazy world" (Julie Andrews) and offer visitors the opportunity to become fitter, more beautiful and more relaxed.

Value and quality: we see ourselves as a premium destination and strive for high-value infrastructure and services.

Discretion and privacy: we protect privacy as much as possible, provide discretion and offer opportunities for maintaining networks.

Safety and reliability: we are committed to safety, as well as dependable, conscientious and dedicated relationships and strengthen the trust of visitors to our region.

Sustainability: we strive for a balanced relationship between preservation and development and preserve the landscape, nature, culture and quality of life.

Our brand/claim



Destination Gstaad Strategy Overview

VISION **Destination Gstaad is** the leading Alpine destination for enjoyment MISSION Visitors to the destination of Gstaad enjoy friendly hospitality, Alpine lifestyle, active recreation and discretion. POSITION-Alpine authenticity - Indulgence - Culture - Unwind - Value ING Discretion - Safety - Sustainability BRAND/ **CLAIM SERVICE** AREAS White mountain experience - Green mountain experience - Lifestyle - Top events - MICE **Tourism Mountain Railways** Accommodation/ Top events/ **ACTION** infrastructure/offer 2 Gastronomy P **MICE AREAS** (WITH A FOCUS • Refurbishing/supplemen-· Using mountains for Ensuring and improving · Strengthening and developing (top) events ting sporting/cultural/ showcasing and the quality of culinary ON TOURISM) establishments positioning purposes conference infrastructure Creating and coordinating Supplementing family Increasing the amount Expanding and the MICE offering of accommodation infrastructure modernising infrastructure available · Optimising the hiking trail network Expanding the positioning as a well-Expanding cross-country being destination skiing options Improving (electric) Increasing the mountain bike options occupancy rate of Expanding adventure accommodation facilities in the off-CROSS-• Looking after visitors with empathy and increasing the Visitor relations NAME OF THE PROPERTY OF THE PR level of convenience **SECTIONAL** Deepening the visitor relationship and promoting visitor **AREAS** • Clearly positioning the destination and making it desirable Market cultivation • Developing and intensifying market cultivation 半 • Expanding public transport services Mobility/transport Optimising traffic management and solving parking space ğ Making human-powered transport more attractive + safer

Sustainability

Digitisation/cooperation agreements/

organisation

Population

<u>.i.</u>

AREA OF **LOCATION DEVELOPMENT** (DUTIES OF THE COMMUNES)

Economy

g_o

*

Promoting sustainability

Infrastructure

authenticity

· Pushing ahead with sustainability projects

• Implementing the digitisation concept

 Entering into cooperation agreements · Promoting tourism awareness

• Strengthening local economic cycles – promoting

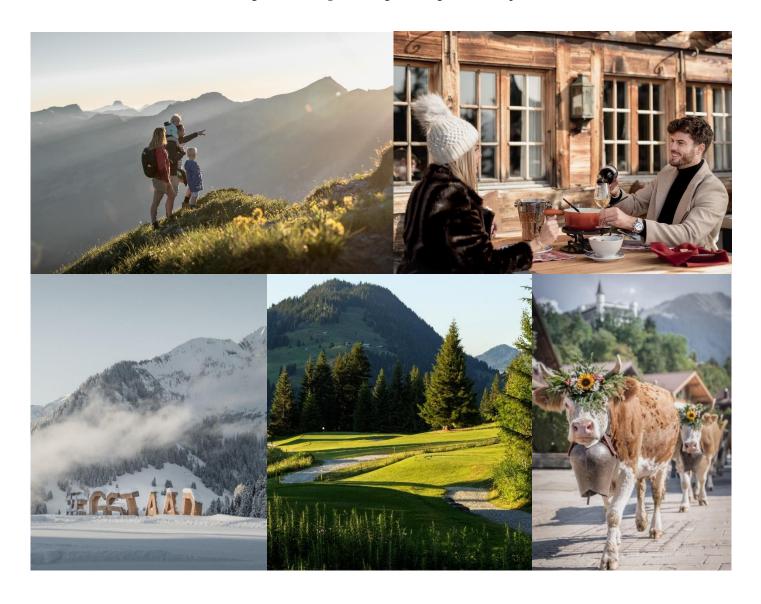
· Performing more in-depth marketing monitoring

Nature/landscape

Our strategic success factors

What makes us unique

- Delightful landscapes and a variety of outdoor activities in the valley and on the mountain
 - High quality of the hotel industry and other types of commercial accommodation
 - Distinctive enjoyment/gourmet culture
- Innovative mountain railways companies, divers excursion destinations, Glacier 3000 with guaranteed snow cover and a high level of recognition
 - Top cultural and sporting events with international appeal
 - International private schools
 - Well-off second-home residents and newcomers
 - Unique townscapes and (chalet) architecture
 - Cosy promenade with lovely shopping experiences
 - Easy access by rail, road and air
 - Good relationships between visitors and local inhabitants
 - Strong **networking** and a high willingness to cooperate



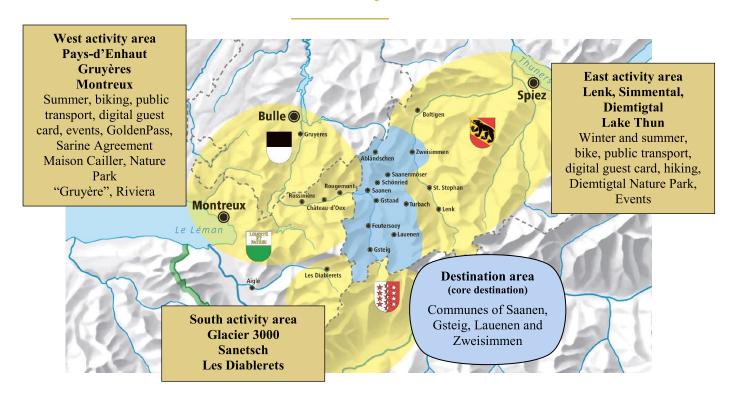
Our strategic principles

What qualitative objectives do we want to achieve?

- 1. We will grow **primarily qualitatively** and only **slightly quantitatively** what we offer **must** have quality.
- 2. We will constantly renew and expand the tourist infrastructure and strengthen our positioning with key projects.
- 3. We will continue to develop **the white and green season** and strengthen the **pre- and post-peak season** in particular.
- 4. We will increase the **period of guaranteed snow cover**, create **wet weather activities** as well as attractions for outdoor enthusiasts, connoisseurs and families.
- 5. We will strengthen **the top events**, develop them further and expand **the MICE offering** (meetings, incentives, conferences and events).
- 6. We will focus our **market cultivation** activities on selected visitor segments and markets and strive for a **balanced mix of visitors**.
- 7. We will be **cautious** where the acquisition of large **group trips** is concerned and not pursue **a low-price strategy.**
- 8. We will intensify the **digitisation** process, in order to improve convenience, to look after our regular visitors (CRM) and to optimise processes.
- 9. We will strengthen **strategic cooperation** and expand the activity area for our visitors.
- 10. We will strive for **sustainable development**, conserve resources and take care of the landscape, nature, culture and our **high quality of life**.

Key message: feel at home with us.

Our activity area



Our quantitative targets

How much momentum do we want?

Accommodation

CAPACITY	AS OF 2020	TARGET BY 2024	IN %
Hotels and similar establishments	2,969 beds (as of 2019)	3,150 beds	+6%
Rented holiday apartments	223 holiday apartments	240 holiday apartments	+7%
Group accommodation	2,033 beds	2,040 beds	+/- 0%

OCCUPANCY RATE	AS OF 2018/19	TARGET BY 2024	IN %
Hotels and similar establishments	37%	40%	+8%
Rented holiday apartments	-	-	+10%
Group accommodation	-	-	+5%

OVERNIGHT STAYS	AS OF 2018/19	TARGET BY 2024	IN %
Hotels and similar establishments	403,484	480,000	+19%
Rented holiday apartments subject to flat-rate taxation	656,014	750,000	+15%
Group accommodation	143,347	150,000	+5%

REVPAR	AS OF 2018/19	TARGET BY 2024	IN %
Hotels and similar establishments	-		+5%

Mountain railways

AREA	2018/2019	TARGET BY 2026	IN %
Sales	27.5 million (90% winter/10% summer)	30 million (80% winter/20% summer)	+9%
EBITDA margin	33%	35%	+6%

Events

- **Expansion** of the **six top events to eight** (one of them in winter). Consciously forego major events that are incompatible with the positioning of Gstaad or that compete with existing events in terms of time, infrastructure or financial resources. If at all possible, they should be held outside the main season.
- **Profiling in the MICE sector**: two to three recurring conferences/meetings with international appeal.

Key figures

- Increase daily expenses per visitor from CHF 119 (2016) with attractive offers to CHF 130.
- Stabilise the tourism sector's share of **the regional gross value added** (GDP) at 45.9% (2016).



Our visitor segments

We focus on **individual visitors** and **multi-generation families** who stay for at least one night in the destination of Gstaad (hotel guests, visitors who stay in a holiday apartment, etc.) or have their second home here (chalet visitors).

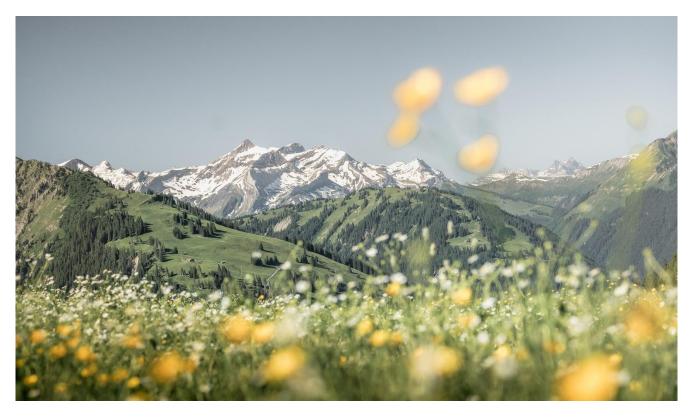
For mountain rides, top events and public transport, attracting a larger number of **day trippers** (sometimes also groups) is of central importance and should therefore not be ignored.

(Any trade-offs require a high level of willingness to compromise by all partners.)

The reasons for the stay:

- 1) The visitor who loves **the snow experience** (white mountain experience).
- (2) The visitor who loves the Alpine summer experience (green mountain experience).
 - (3) The visitor who attends **top cultural or sporting events**.
- 4 The visitor who is seeking various types of **enjoyment** (recreation, wellness, gourmet, lifestyle).
- (5) The visitor who is staying in the destination because of the **private schools.**
 - (6) The visitor who comes to the destination for **a meeting** or **conference**.

Everyone appreciates **enjoyment in all its facets** and **the sporting or cultural** experience. Everyone appreciates the **high quality** and is willing to pay **a reasonable price**.



Our geographic markets

We want to focus on the following markets:

GEOGRAPHIC MARKET	FOCUS	MESSAGE
 Switzerland Canton of Bern/Vaud/Fribourg Main Geneva-Basel axis Selected target groups in Zurich, Central Switzerland 	Use of 60 to 70% of total funding Product-specific	Spring/summer/autumn: Into nature's tranquillity Winter: "Slow down" Product-specific Top events
Europe - France - UK - Benelux - Germany (focussing on southern Germany)	Use of 20 to 25% of total funding Luxury only	Authentic nature A skiing/hiking experience to remember
Remote markets - USA - GCC	Use of 5 to 20% of total funding Luxury only: focus on the East Coast	Tradition, well-being, luxury, "pleasantly cool summer weather"

Our priorities concerning market cultivation

Financial commitment:

RANGE OF OFFERS	USE OF FUNDS	PRODUCTS/TOPICS
White mountain experience	Top priority: 35%-40%	Skiing (Alpine skiing, snowboarding, freeriding)
	Secondary priority: 5%-10%	Winter hiking, mountain gastronomy, tobogganing, cross-country skiing, ski touring, snowshoeing
Green mountain experience (Spring/summer/autumn)	Top priority: 30%-35%	Hiking, mountain experiences, mountain gastronomy
	Secondary priority: 5%-10%	Bike (racing bike, electric bike, mountain bike) Golf
Lifestyle	5-10%	Catering Well-being Art/culture Tradition Sustainability
Top events MICE	5-10%	Top events Meetings, Incentives, Conferences & Exhibitions (MICE)

The figures refer to destination marketing (Gstaad Marketing GmbH). Due to significant events, such as the pandemic, the allocation of funds must be adjusted and used flexibly in consultation with key partners.

Our strategic action areas

Development strategies and key projects relating to tourism

With the overview of the strategic fields of action and the listing of key projects, the intention is to **coordinate** the key projects and to **focus** on those projects that significantly help to achieve the goals.

The above is without prejudice to the project-related decisions of the responsible service providers and authorities. The following overview is to be updated annually.

General tourist infrastructure/offers
White and green mountain experience

DEVELOPMENT STRATEGIES/KEY PROJECTS	DEADLINE	LEAD		
Refurbishing/supplementing sporting/cultural/conference infrastructure (white and green)				
 Indoor facility concept for culture & sport Renovation of the Gstaad ice rink grounds Skifuture Expansion of the Sparenmoos summer/winter leisure activities and facilities Professional kitchen in sports lodge 	2022 2023 2022 Ongoing 2022	Gde Saanen Eisbahn AG/Gde Sa. Skifuture Sparenmoos Aktiv Sportzentr./Gde Saanen		
Supplementing family infrastructure (white and green)				
 STATION Saanen, alternative wet weather programmes Saani's adventure trails Schönried-Saanenmöser/Saanen-Gstaad Retrofitting/showcasing children's ski paradises Tobogganing trails BDG (Eggli) Zweisimmen outdoor pool Saanen outdoor pool Public toilets/cloakroom/information point Saanenmöser Activities of village organisations 	2021 2021 Ongoing 2023/24 Ongoing 2021 2022 2021	GST GST Snow sports school/GST BDG GZ/SBGZ Sportzentr./Gde Saanen GST DO		
Optimising the network of hiking trails (white and green)	Optimising the network of hiking trails (white and green)			
 Green and white hiking trails Snowshoe trails and leisure infrastructure Allocation of tasks within infrastr. team (maintenance, crossings, signage) 	Ongoing 2022 2021	Communes, GST GST GST		
Expanding the cross-country skiing offer (white)				
 Cross-country ski trails/cross-country skiing learning park Schönried/Sparenmoos Use of snow-making equipment or relocation of snow Entry points and signage 	Ongoing Ongoing Ongoing	GST/Sparenm. Aktiv GST GST		
Improving (electric) mountain biking options				
 Horneggli bike trails/bike trails in general Bike route planning, national coordination, eliminating riding bans Awareness campaign 	2023/24 3rd Q 2021 2021	GST/communes GST/Bergregion OSSL GST		
Expanding adventure options				
 Sculpture trail (incl. Mirage Gstaad) Temporary art attractions Gstaad Card Developing a bridle paths concept 	2022 Ongoing 2021 2022	GST GST GST GST		

Mountain railways (incl. mountain gastronomy) White and green mountain experience

DEVELOPMENT STRATEGIES/KEY PROJECTS	DEADLINE	LEAD	
Using mountains for showcasing and positioning purposes (summer and winter)			
 Rinderberg (Alpine herb trail, viewing platform, circular trail, wooden lodge) Wispile (viewing platform, toboggan run, circular hiking trail, etc.) Rellerli (year-round touristic use excluding normal skiing operations) Replacing the Rellerli gondola Opening the Eggli Lounge Year-round excursion destination Glacier 3000 (glacier experience, peak walk) 	2021-2025 2021-2025 Ongoing 2024 2021/22 ongoing	BDG/GM/GZ BDG/GM/GST Friends of the Rellerli Friends of the Rellerli BDG Glacier 3000	
Expanding and modernising infrastructure (mountain railways, snow-making equ	uipment, mou	ntain restaurants)	
 Replacing the Horneggli chairlift Replacing the Hornberg chairlift Replacing the Wispile gondola Replacing the Rinderberg gondola Replacing the Wasserngrat gondola Wasserngrat ski race track Videmanette snow-making equipment Rinderberg snow-making equipment Eggli snow-making equipment Hornberg/Chaltebrunne/St. Stephan snow-making equipment Cabane-Pillon valley run 	2025 2026/27 2029 2032 2035 2022/23 2022 2023 2023 2025 2022	BDG BDG BDG BDG BB Wasserngrat 2000 BB Wasserngrat 2000 BDG	

Accommodation/gastronomy White and green mountain experience/lifestyle

DEVELOPMENT STRATEGIES/KEY PROJECTS	DEADLINE	LEAD	
Ensuring and developing the quality of the hospitality businesses (white and green/lifestyle)			
 Well-being/spa/wellness offering Family programmes Quality and production concept 	2022	Hotelierverein Hotelierverein BDG/Glacier 3000	
Developing the accommodation offering (also hybrid forms) (white and green)			
 Hotel Solsana, Saanen Swiss Alpine Village, Saanenmöser The Mansard Gstaad Faith Mountain AG, Schönried 			
Expanding the positioning as a well-being destination (white and green/lifestyle)		
Product development	2021	GST	
Increasing the occupancy rate of accommodation facilities in the off-season			
 Camping 2.0 Agrotourism Development concept for holiday homes/group accommodation 	2022 2022 2022	GST GST/Land. Vereinig. SL GST	

Top events/MICE

White and green mountain experience

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DEVELOPMENT STRATEGIES/KEY PROJECTS	DEADLINE	LEAD
Strengthening and developing (top) events		
 Event strategy, event coordination, event supporters 	2021	GST/Gde Sa./Events

Establishing two new major events, one of which in winterImpact Summit Gstaad	2024 2022	GST GM/ISGA Association
Creating and coordinating MICE offerings		
 Establishing conferences (e.g. Swiss Hiking Congress,) Product development "seminar" "Meetinature" 	2022 2021 2021	GST GST GM

Cross-cutting areas

Visitor relations

DEVELOPMENT STRATEGIES/KEY PROJECTS	DEADLINE	LEAD	
Looking after visitors with empathy and increasing the level of convenience			
 Concierge service (coordination platform) Lauenen/Gsteig/Schönried tourist office Weekly program with entertainment provided by rangers/guides/mountain guides/ski instructors 	2021 2021 2021	GST GST GST	
Deepening the visitor relationship and promoting visitor loyalty			
 Loyalty programme in CRM/coordination with existing systems Family programme Introduction of digital tools (Gstaad online, system of registration) Charm offensives 	2021 2021 2021 2021	GST GST GST GST	

Market cultivation

DEVELOPMENT STRATEGIES/KEY PROJECTS	DEADLINE	LEAD		
Clearly positioning the destination and making it desirable				
 Technology-related development of the website Target group-specific campaign management for core products and markets Supply-driven product marketing based on customer requirements (ongoing) Image-forming marketing projects (e.g. Gstaad on Tour, Impact Summit) Coordination and professionalisation of cross-company media relations 	Ongoing Ongoing Ongoing Ongoing 2021	GM GM GM/GST GM		
Developing and intensifying market cultivation				
 Intensifying marketing efforts and increasing effectiveness through optimisation projects Market penetration through increased media funding Including top events in summer and winter communications 	Ongoing Ongoing Ongoing	GM GM GM		

Mobility/transport

DEVELOPMENT STRATEGIES/KEY PROJECTS	DEADLINE	LEAD
Expanding public transport services		
 Public transport included in winter (new model) Golden Pass Express (direct connection between Montreux and Interlaken) Diemtigtal Nature Park, connecting Seebergsee to the public transport network Lake Arnen shuttle bus (feasibility study/concept development) 	2021 2022/23 2022 2022	GST GST NP Diemtigtal/ZT GST/Gde Gsteig
Optimising traffic management and solving parking space problems		

 Schönried thoroughfare Parking space solutions in Schönried and Saanenmöser ZEZ (future access point to Zweisimmen) 	2024 Ongoing Ongoing	Gde Saanen/Kt. BE Gde Saanen/BDG Gde Zweisimmen.
Making human-powered transport more attractive and safer		
 Upgrading Untergstaadstrasse 		Gde Saanen

Sustainability

DEVELOPMENT STRATEGIES/KEY PROJECTS	DEADLIN E	LEAD	
Promoting sustainability			
 Sustainability strategy for the whole destination 2021/2022 action plan SWISSTAINABLE Level I, later Level II 	2021 2021 2021/23	GST GST GST	
Pushing ahead with sustainability projects			
 Impact Summit Gstaad Partnerships (Climeworks, too good to go, etc.) Nature-based tourism in Lauenen Nature-based tourism in and around Lake Arnen Mountain with natural snow (CO2-neutral) Electromobility 	2022 Ongoing 2022 2023 2024 2023	GM/ISGA GM/GST Gde Lauenen/GST Gde Gsteig/GST GST	
Strengthening local cycles – promoting authenticity			
 Networking local production/businesses/hospitality "Authentic Gstaad – Alpine authenticity" (agrotourism, sustainable farming) Sustainable construction Energy sector 	Ongoing 2021 2021 2024	GST GST/Land. Vereinig. SL Business Communes	

Digitisation/cooperation agreements/organisation

DEVELOPMENT STRATEGIES/KEY PROJECTS	DEADLINE	LEAD
Continuously implementing the digitisation concept		
 1st stage: marketplace, holiday guides, daily notices 2nd stage: guest card (Gstaad Card), system of registration 3rd stage: website, CRM, social media 	2021 2021 2022	GST GST GM
Performing more in-depth marketing monitoring		
 Destination cockpit management Market research in the destination/market research in the markets 	2021 Ongoing	GST GST/GM
Entering into cooperation agreements		
 Cooperation agreement with Diemtigtal Nature Park, Lenk-Simmertal and Pays-d'E Service level agreements with attraction points outside the destination 	Ongoing Ongoing	GST GST
Promoting tourism awareness		
 Information/participation of the population/campaign planning 	Ongoing	GST
Optimising and consolidating organisational structures		
 Allocation of tasks/cooperation between GST/GM/BDG Destination Council Interest group for top events 	2021 2021 2021	GST/BDG/GM GST/suppliers Top events

Our milestones

Key projects with potential to attract visitors

WINTER 2020/21 →	SUMMER 2021 🕏	<i>WINTER 2021/22</i> ⇒	SUMMER 2022	<i>WINTER 2022/23</i> ⇒
Station SaanenEggli Berghaus	Saaniland adventure trailsGstaad CardPublic transport including Sun.	 Golden Pass Express Eggli Lounge Public transport included in winter 	 Concept for cultural & sporting infrastructure Sculpture trail Nature-based tourism Lauenen 	 Skifuture Renovation of the Gstaad ice rink grounds Glacier 3000 valley run
SUMMER 2023 🕏	WINTER 2023/24	SUMMER 2024 🖒	WINTER 2024/25 →	OUTLOOK
 Camping 2.0 Nature-based tourism in and around Lake Arnen 	 Major winter event Parking space solution in Schönried/ Saanenmöser Mountain with natural snow Eggli toboggan run 	Horneggli bike trailsShowcasing Wispile	 Showcasing Rinderberg Schönried thoroughfare Ice Express Glacier 3000 	Cultural and sporting facilitySwiss Alpine Village

Controlling

The "Strategy for the destination of Gstaad" is to be reviewed and updated **annually** by the Destination Council*:

- **Process audit:** reviewing the **decision-making and planning processes** and developments towards achieving the strategic objectives and progress on key projects
- **Results audit:** reviewing interim **results** such as frequency targets, advertising campaign reach, or positioning

Every **four years**, the "Strategy for the destination of Gstaad" will be reviewed and approved by the Destination Council* **as a matter of principle.** GST coordinates the process:

- **Impact audit:** reviewing **the effectiveness**, in particular with regard to visitor satisfaction, tourism awareness in the population and the financial results
- Planning assumptions audit: reviewing the assumptions about the fundamental values and developments

*The Gstaad Destination Council (GDC), which is to be newly established, sees itself as a "round table" for the strategic development of the destination of Gstaad. The goal is that members should regularly inform each other and thus strengthen their cooperation. It is composed of representatives of the signatory institutions of the Strategy for the destination of Gstaad.

Destination Gstaad

GSTAAD | SAANEN | SCHÖNRIED | SAANENMÖSER | ZWEISIMMEN LAUENEN | GSTEIG | FEUTERSOEY | TURBACH | ABLÄNDSCHEN

SIGNATORIES

Local authority of Saanen	Local authority of Gsteig	Local authority of Lauenen
Local authority of Zweisimmen	Gstaad Saanenland Tourism	Bergbahnen Destination Gstaad
Gstaad Marketing	Hotelierverein Gstaad- Saanenland	Gewerbeverein Saanenland
Landwirtschaftliche Vereinigung Saanenland	Snow and mountain sports schools	Gstaad Sports Centre
Dorforganisation Gstaad	Dorforganisation Saanen	Dorforganisation Schönried
Dorforganisation Saanenmöser	Zweisimmen Tourism	Dorforganisation Lauenen
Dorforganisation Gsteig/Feutersoey	Dorforganisation Turbach	Dorforganisation Abländschen
Glacier 3000	Wasserngrat 2000	Gstaad Airport
Sparenmoos Aktiv	Gstaad Menuhin Festival & Academy	Sommets Musicaux
Country Night Gstaad	Swiss Open Gstaad	Beachvolley Gstaad
	Polo Gold Cup Gstaad	