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Focus.



Facts and figures.

Gulf states*

| | |
|---|---------|
| Overnights 2011 | 418,609 |
| Overnights 2001 | 216,995 |
| Growth in overnights (2001–2011) | +92.9 % |
| Opening of the ST office in Dubai (presence since 2002) | 2011 |
| Launch of MySwitzerland.com in Arabic | 2010 |
| Advertising & marketing contacts 2011 | 10.14 m |

* Saudi Arabia, United Arab Emirates, Kuwait, Qatar, Bahrain, Oman

Focus.

Focus on the Gulf states.

In ten years the number of overnights by visitors from the Gulf states has almost doubled; the growth potential is about 5 % a year. ST has therefore expanded its local presence and boosted its marketing activities.

Award-winning wellness facilities, outstanding educational training and medical care, luxury accommodation: Switzerland has many assets that are rated highly in the Gulf states. Consequently, in 2011 ST boosted its investments and team in Dubai. The diversification of destinations offered, the promotion of visits during all seasons of the year – bearing in mind travel restrictions during Ramadan – and marketing measures targeted at women are the main pillars of ST's work in the Gulf states, where Switzerland is held in great esteem as a European travel destination.



“Women are well connected.”

Two questions to Jörg Krebs, Director of ST IMEA (India, Middle East, Africa).

Why are women at the heart of efforts to promote Switzerland in the Gulf states?

In these countries women are extremely well connected, both privately and professionally, and are often decision-makers within the family.

How can ST target potential visitors from the Gulf states in an even more focused way?

By placing emphasis on attractive, year-round offers that correspond precisely to the requirements of these visitors – for example, spacious hotel rooms and exclusive service.



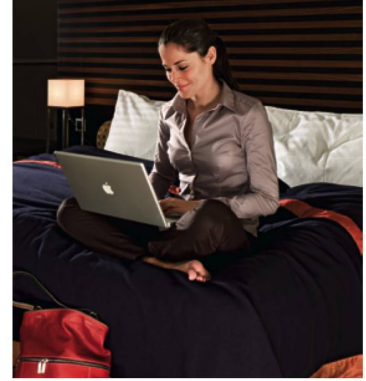
Daniela Bär (second from left), ST's Head of International Media and Corporate Communication, during the cultural exchange in Abu Dhabi.

Essential personal contact.

Position Switzerland as a holiday destination and leading venue for healthcare and education: this was the mission of eleven women in leading positions in Swiss society who undertook a journey in March – devised and accompanied by ST – to Jeddah, Riyadh, Kuwait City and Abu Dhabi. At a series of events at universities, businesswomen's clubs, cultural centres and embassies, the Swiss delegation enjoyed direct, open and warm exchanges with about 450 local female decision-makers. Along the way the participants established high-quality contacts that represent a valuable basis for further collaboration.

Tourism Monitor Switzerland.

The Tourism Monitor Switzerland (TMS), carried out by Switzerland Tourism, is the largest national visitor survey. In 2010, a total of 9,168 overnight leisure guests from 110 markets of origin were surveyed in 100 Swiss destinations. Established in 2006, the TMS is carried out every three to four years. For the first time, the database of findings is available to members of Switzerland Tourism via an online analysis tool, as well as in the form of numerous reports – all free of charge, at the partner website STnet.ch.



Added value and the uses of the TMS.

The TMS pinpoints the preferences and behaviour of visitors as well as knowledge of the market. As a result, the survey is invaluable for making good marketing decisions. The findings have priority importance in ST's strategic and operative marketing:

- To identify opportunities for the sustained enhancement of tourist added value.
- To position and differentiate Switzerland as a tourism destination on the basis of the destination's image, visitor requirements, tourism strengths and also competitive advantage.
- To optimise what the destination offers based on guest satisfaction levels.
- To carry out effective marketing on the basis of knowledge gained about sources of information used and booking patterns.

The two most important differentiating features are the country's natural landscapes and Switzerland's strong and solid brand. Such findings flow directly into ST's strategic planning.

Hospitality: a customer perspective.

What sources of information do first-time visitors from China use? How many days in advance are wellness holidays in the Alps booked? What are the motives for visiting Swiss cities? Many such questions can be answered definitively through the findings of the TMS survey. As an example of the detailed analysis possible, this double-page spread examines the theme of hospitality.

The survey covers 20 different theme areas, and a wide variety of subjects relevant to marketing – such as sources of information used, booking patterns, guest requirements, the image of the destination and guest satisfaction. The last is examined in detail by assessing a variety of factors, one of which is hospitality. This is reviewed opposite, as an example of the 200-odd individual themes analysed by the TMS. After nature, hospitality is the second most important priority for visitors. It is therefore a central criterion for visitors' choice of destination. 78 % of visitors rate their experience of Swiss hospitality positively – a figure that lies roughly in the middle of the results for all aspects rated. The regions that scored highest were Eastern Switzerland and Valais, achieving satisfaction levels

of more than 90 %. Across Switzerland as a whole, a qualitative examination of the figures reveals that the following aspects of hospitality were found lacking (see diagram opposite):

1. Friendliness and warmth
2. Service-orientedness
3. Intercultural and linguistic skills

Restaurants are mentioned most often in connection with a lack of hospitality. Within Europe it is visitors from France, Italy and Spain as well as Swiss guests who would particularly like better hospitality. Visitors from Asia, meanwhile, often feel poorly understood as a result of cross-cultural or linguistic obstacles.

Hospitality – a detailed analysis.

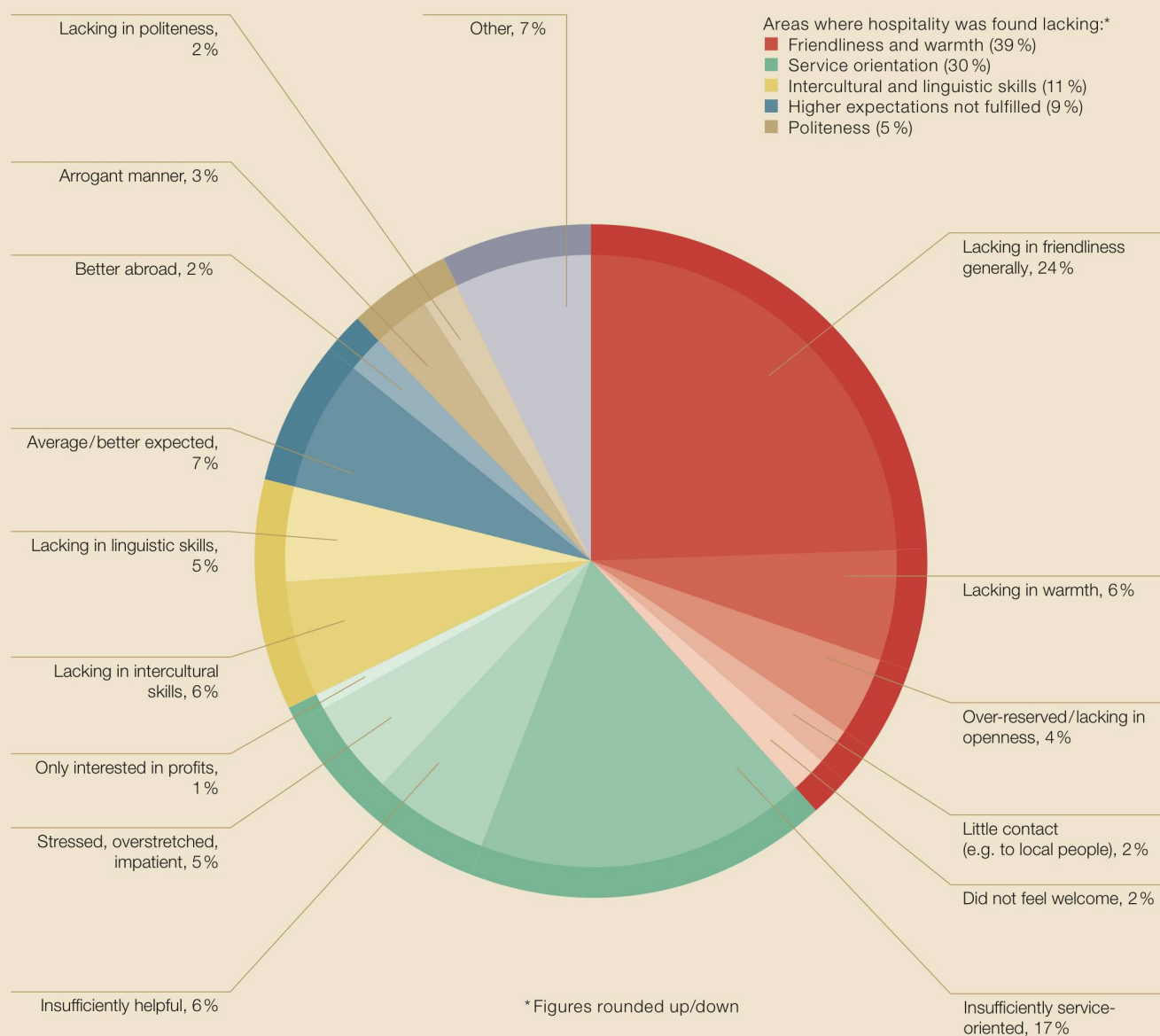
Which regions of Switzerland score best in terms of hospitality? Visitors from which markets are most satisfied with hospitality? The table below answers these questions, while the graphic shows exactly how guests think hospitality could be improved.

Hospitality: top scores.

| Position | Tourist region | Position | Market of origin |
|----------|-------------------------------|----------|-----------------------------------|
| 1 | Eastern Switzerland | 1 | Nordic countries & Eastern Europe |
| 2 | Valais | 2 | USA |
| 3 | Basel | 3 | Netherlands |
| 4 | Lucerne – Lake Lucerne Region | 4 | Germany |
| 5 | Bernese Oberland | 5 | Russia |

How hospitality could be improved.

Reasons given for finding the level of hospitality inadequate.*



Facts and figures.

| United Kingdom | 2011 |
|----------------------------------|---------|
| Overnights | 1.7 m |
| Change compared with 2010 | -8.3 % |
| Media reports generated | 1,252 |
| Visits to MySwitzerland.com | 928,320 |
| Advertising & marketing contacts | 339 m |
| High-value customer contacts | 168,128 |



Inauguration of the new Swiss glockenspiel in London's Leicester Square.

Focus on the UK.

The United Kingdom is an important player: among the leading markets of origin, it occupies third place after Switzerland and Germany. Nonetheless, the number of overnights fell dramatically in 2011.

The drop in numbers of hotel overnights by visitors from the United Kingdom – primarily because of the weakness of sterling – is of particular concern given the UK's high market share. After solid growth until 2008, the number of overnights has fallen, sometimes dramatically (2009: -18.6 %; 2010 -0.1 %; 2011 -8.3 %). ST was able to use targeted impulse measures (details below left) to help limit the potential decline in 2011. Meanwhile, guests from the UK remain loyal repeat visitors, travelling throughout Switzerland – exploring the cities as well as the mountains.



“A deep-rooted affection.”

Two questions to Marcelline Kuonen, Country Manager ST UK & Ireland.

How will ST limit declines from the UK?

We are investing impulse funds in the Swiss programmes of key tour operators – at Inghams with a free weekend for bookings from seven days, at Kuoni with 2-for-1 short breaks, at STC with 2-for-1 city flights. This builds on our guests' loyalty to Switzerland.

Why are UK visitors attached to Switzerland?

It was the British who initiated tourism in Switzerland. This tradition is deeply rooted here, and is very noticeable.



Harrods hosts Switzerland.

In April, ST invited visitors on a journey of discovery at a prestigious venue: about 1.4 million visitors to the famous London department store Harrods had the chance to discover Switzerland's cuisine, landscapes and products – with an emphasis on quality throughout. Swiss flags hung from the façade, Switzerland's tourist regions offered interactive presentations in Harrods' shop windows, and the world-famous Food Hall served and sold Swiss specialities. The monthly “Harrods” magazine (250,000 copies), meanwhile, was devoted to the delights of Switzerland.

Award-winning Switzerland: prizes in 2011.

At international contests in 2011, Switzerland yet again impressed the experts.

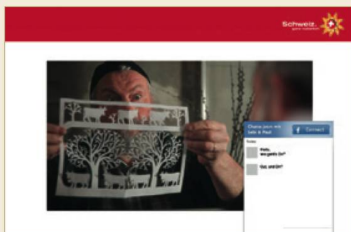
ST repeatedly achieves original and eye-catching global public profile. Internationally, this is recognised with specialist prizes, which also gain authori-

tative recognition for Switzerland's tourism sector. The country itself has been awarded top marks by international organisations, while various promotional activities and the ST market representations themselves have also scooped prizes. Here are nine examples from 2011.



Edi, Cannes Lion, Licorne

ST's TV ad "More than mountains" scored top prizes: an "Edi" in Switzerland, a "Cannes Lion" and "Licorne d'Or" in France, and 1st place at the Czech TOURFILM Festival.



Internet idea wins

ST's online campaign "Holidays without Internet" (pages 21 and 30) won the "Grand Prix" in the PR category at the Eurobest Awards, which honour exceptional creative achievement.



Prize for all the senses

In Spain, "Suiza abre sus puertas" (page 20) was honoured by "Territorio y Marketing" for the creative way it brought the Summer and Cities campaign vividly to life.

Promotion

Gilles Dind, Market Manager ST Spain, with Elisa Carreras, Director of "Territorio y Marketing".



"MICE Travel Award"

Lined up against fellow finalists Hungary, Poland and the Czech Republic, ST Netherlands scooped the "MICE Travel Award" for "Best upcoming incentive destination".



Tour operators' favourite

ST Russia was honoured by the Association of Tour Operators of Russia (ATOR) for the best promotional event, the best print production and the best audio-visual campaign.



Innovating for Switzerland

When the renowned National Geographic Traveler announced its Gold List Awards, it presented the prize for "Best Tourism Promotion Innovation" to ST China.

Representations

Left (left to right): Jan Lokhoff, MICE & Business Travel, Lisette van Dolderen and Nicole Schaffner, ST Netherlands, Astrid Heystee, MICE & Business Travel.

Centre: Jonas Ettlin, Market Manager ST Russia (until October 2011), Elena Skuratova, Director of Renaissance Insurance (main sponsor of the ATOR awards).

Right: Hui Feng, ST Beijing (fifth from right) with all the winners.

Favourite country

In the UK, the highly respected Guardian/Observer media group honoured Switzerland in their 2011 Travel Awards as "Favourite European country". Deciding factors for the win were the country's clean air, high quality of life, beautiful mountain scenery and the wide range of outdoor activities on offer.

Top for adventure travel

In 2011, George Washington University, Xola Consulting and the Adventure Travel Trade Association published the "2010 Adventure Travel Development Index", which ranks holiday destinations according to principles of sustainable development in adventure tourism. The report placed Switzerland first among developed countries.

WEF: Switzerland is No. 1

The World Economic Forum (WEF) reviewed 139 countries for the "Travel & Tourism Competitiveness Report 2011" to assess their suitability for strong growth in the travel and tourism sector, following the economic downturn. Switzerland ranks first, thanks to its sustainable approach to development, its facilities and high quality.

Switzerland as a destination



Solid funding.

With a budget of 210 million Swiss francs for the period 2012 to 2015, the Confederation has given ST a big vote of confidence. The increased funds will help intensify market diversification.

The strength of the Swiss franc and the worldwide economic upheavals are impacting the main markets crucial for the Swiss tourism industry (the eurozone, the USA, the UK). This clearly demonstrates how important it is for ST to have adequate federal funding in order to speed up market diversification. This will help counter the negative consequences of the economic situation in Europe, but will also compensate for the fact that guests' visits have on average become shorter – a trend that is markedly apparent internationally.

With the budget of 210 million Swiss francs for the period 2012 to 2015 – an increase of 10 % compared with the preceding period of 2008 to 2011 – parliament recognises the scale of the challenges that face the tourism industry. At the same time, it is a vote of confidence in ST to target these funds effectively in order to strengthen Switzerland's presence in new and strategic growth markets, and to promote it as a tourist destination worldwide. ST also received an additional 12 million Swiss francs from the Confederation in 2011 as funding for an impulse programme to promote tourism in Switzerland (page 24). Thanks to this, and the steady support of all participants in the tourism sector, ST has a solid basis for implementing the measures and activities planned for the coming four years.

Market diversification counters the uncertain economic situation and will also help compensate for guests' shorter average length of stay.



Outlook.

Market diversification is at the heart of our activity.

Visitors from the strategic growth markets can help revitalise summer tourism in Switzerland.

In 2012 the strong Swiss franc and the uncertain economic situation will continue to weigh on consumer confidence in the euro zone, the USA and the UK. ST must therefore boost its activities in markets with great growth potential. The intensification that was initiated in 2010 will come to fruition in 2012 with the creation of new posts in the Asia-Pacific region (Singapore, Australia and Korea), the expansion of activity in the Nordic countries and Poland and the opening of representation in Brazil. To facilitate this, the share of the marketing budget earmarked for the strategic growth markets (Brazil, China, India, the Gulf states, Poland and Russia) is being increased by 32.4 % compared with the previous year.

Summer 2012 offers 1,001 ways to relax on the water.

Visitors from the strategic growth markets come to Switzerland primarily in the summer (with the exception of those from Russia and Poland). With their fondness for Switzerland and its landscapes, they play a key role in the revitalising of summer tourism. One of the great attractions of summer in Switzerland – both in the cities and the mountains – is the abundance and proximity of water. For its Summer campaign 2012, ST in collaboration with its regional partners will highlight the myriad facets of this precious resource.