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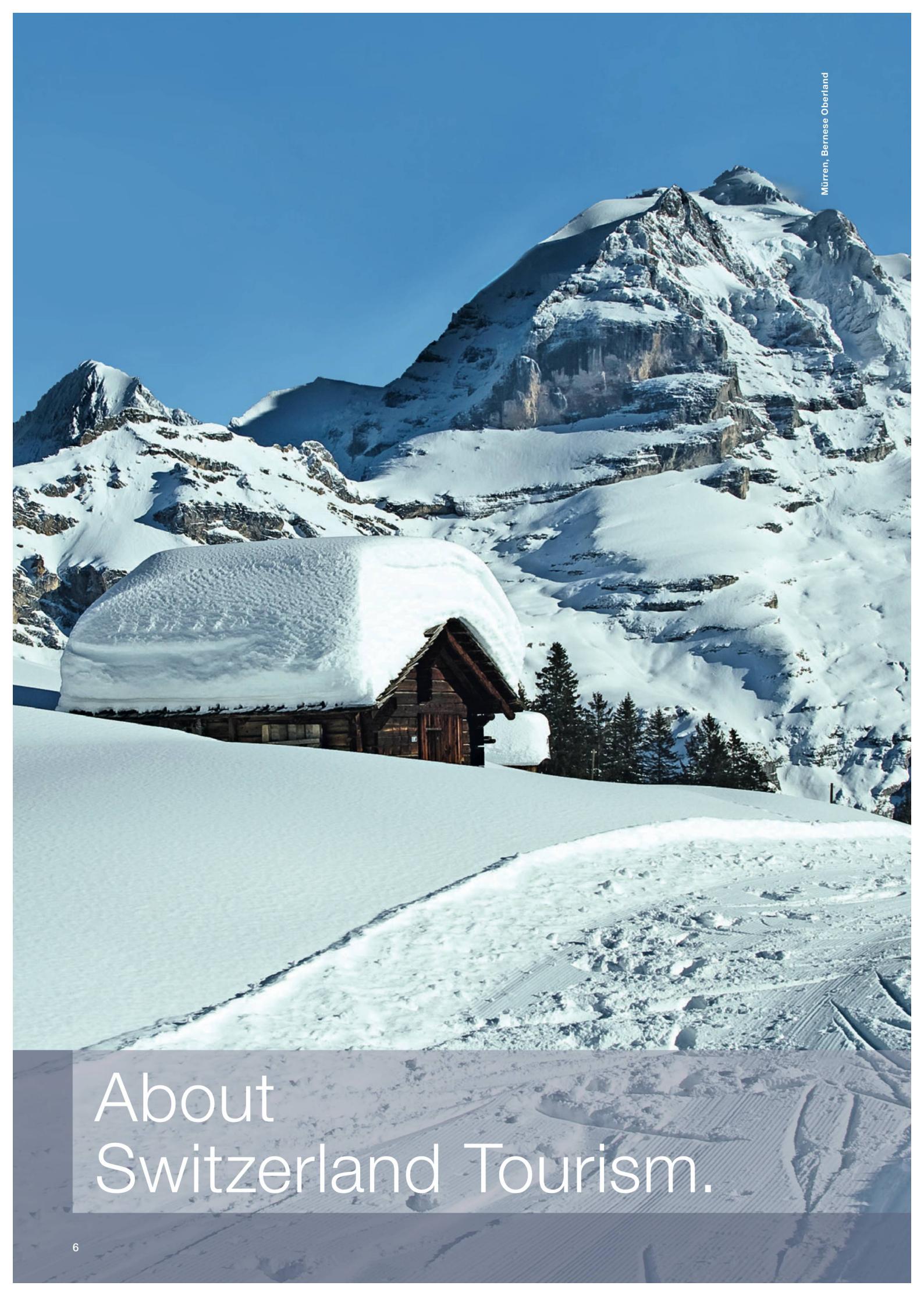
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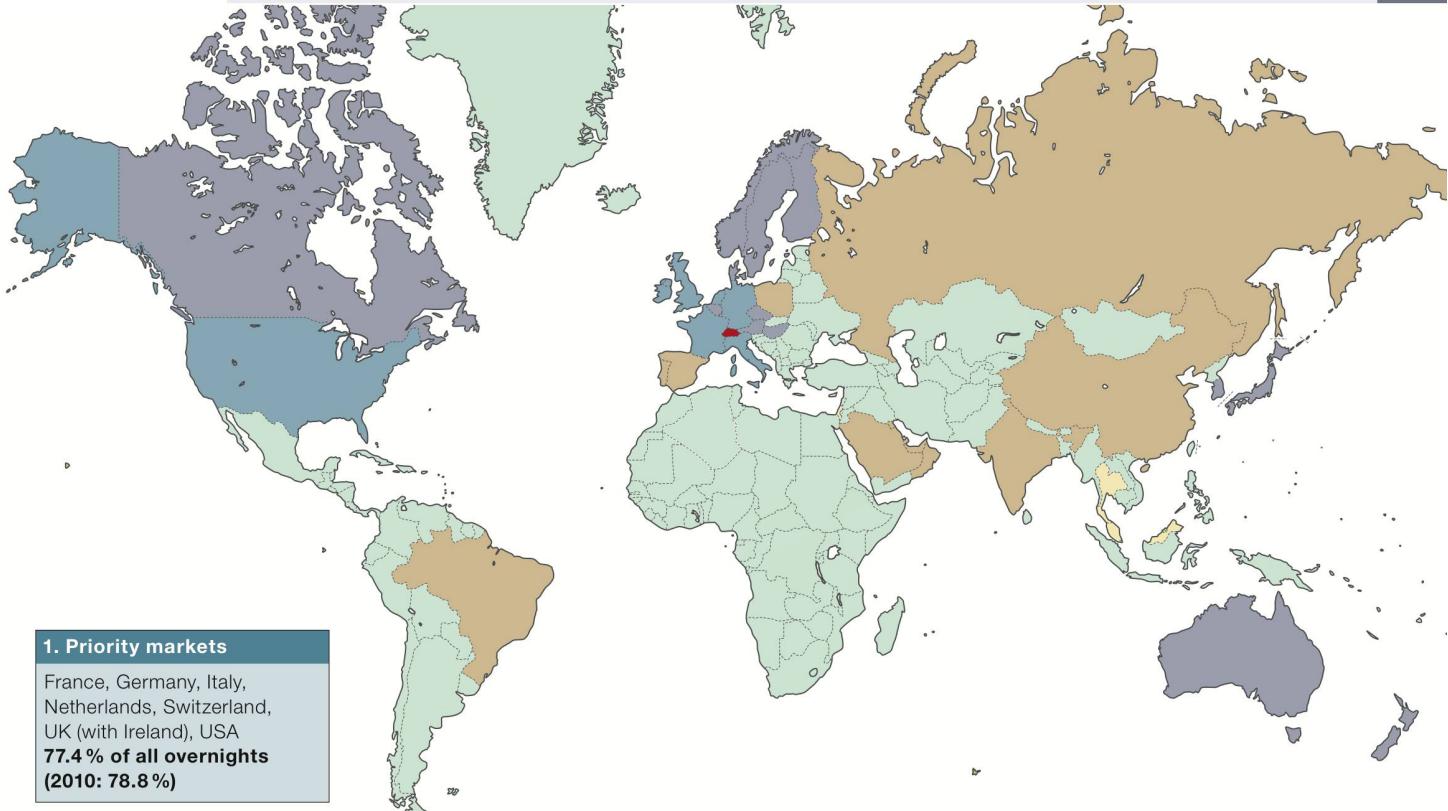
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# About Switzerland Tourism.

## Facts and figures.

Country representations	21	Spending	CHF 97.10 m
Regional representations	9	of which regular federal funding	CHF 47.04 m
Headquarters in Switzerland	1	Spending abroad	CHF 72.65 m
Representations in developing markets	4	Equity ratio	43.40 %
Staff	231	Marketing budget/marketing staff	CHF 328,800
of which trainees	22		



## Selling Switzerland.

Promoting Switzerland worldwide as a holiday destination: Switzerland Tourism campaigns under its slogan “Switzerland. get natural.” – and with a clearly defined contemporary concept of Swissness.

The marketing organisation Switzerland Tourism (ST) has a long history. By federal mandate it has been promoting Switzerland as a holiday, travel and conference destination at home and abroad for more than 90 years. ST's work positions Switzerland as a tourism brand standing for quality, naturalness, authenticity, sustainability and modernity, under the overall concept of “Swissness”. To this end, it develops a systematic marketing programme that it implements creatively with its partners through a full range of promotional and sales techniques.

ST is a public corporation. Its board comprises 13 representatives from tourism, business and industry associations. Jean-François Roth is ST's president, and Jürg Schmid is responsible for operational management. ST is headquartered in Zürich, with a presence in 26 countries, employing 231 staff.



Rhätian Railway, Alp Grüm (Bernina Pass), Graubünden

## Exchange rates: a special challenge.

As a tourism product, Switzerland is in good shape. But the strong Swiss franc has made the country more expensive than ever.

Switzerland has already laid the foundations for tourism growth, and offers an unrivalled experience: the World Economic Forum's Travel & Tourism Competitiveness Report 2011 once again ranked Switzerland first. Most visitors, however – those from the priority markets using euros, British pounds or US dollars – must now spend more to visit because of the strength of the franc. At the same time, Swiss tourists – an important element of support in

such challenging times – are being drawn abroad by attractive prices.

### Looking to the summer

Summer is becoming ever more important. It is popular with visitors from growth markets less affected by the strength of the franc. They offset around a third of the drop in hotel overnights registered by visitors from economically weak Europe in 2011. As a result, ST is investing disproportionately in markets with strong growth potential. In addition, Switzerland competes in summer with Mediterranean destinations. Developing the summer product, then, is vital.

Naturally: keeping customer promises.



Nature



Authenticity

The Swiss experience

Slogan: "get natural."

ST holds two trump cards. In addition to a variety of sublime natural landscapes – the main draw for most of our visitors – Switzerland offers an exceptional first-hand experience of authentic living tradition. This combination is highlighted by ST's slogan "get natural.", which is not just an invitation but also a promise. In this way Switzerland sets itself apart from the competition, emphasising above all the quality of the experiences it offers.

# Vision and expertise for the industry.

Within the tourist sector, ST is the key information hub and centre of expertise for powerful global marketing. Here, quality is the driving force.

Switzerland as a destination differentiates itself from the international competition by the quality of what it offers. Given prevailing conditions, price discounting is not an option for the long term (see page 8). ST instead promotes an all-round drive for quality – in the creation and implementation of its own channels of communication, in product development and in its regular contacts with the tourism sector. The guiding principle is “Leadership Through Quality”.

## A partner with know-how and responsibility

ST is committed to sustainable development in all tourism activity throughout Switzerland, rooted in

economic, social and environmental responsibility across all linguistic regions. ST stands in open and committed dialogue with the tourism industry, its partners, the media, colleagues and guests.

## Fitting collaborations for fresh messages

ST works worldwide with established partners. This creates a stronger market presence for all involved as well as lasting overall impact. ST gains global attention for Switzerland's tourism products via original and unconventional messages, communicated not least through modern social media channels, whose use is systematically integrated into the marketing mix. The guests won in this way benefit the whole sector, thanks to positive image transfer and direct added value.

# A commitment to enhancing quality.

ST promotes quality through the Q-label Quality programme and the “Enjoy Switzerland” scheme, as well as through its transparent hotel rating system and hotel co-operation structured around strict quality requirements.

Hubert W. Rizzi (right), chief auditor at the Swiss Association for Quality and Management Systems (SQS), presents the ISO 9001/14001 certificate to Martin Nydegger, ST's Head of Business Development and member of the Executive Board.



## Achieved: top quality seal.

In 2011, ST gained the top QIII quality seal of the three-stage quality programme for tourism, as well as ISO certification for quality and environmental management (ISO 9001/14001). The defined processes, consistently implemented, guarantee quality and efficiency.

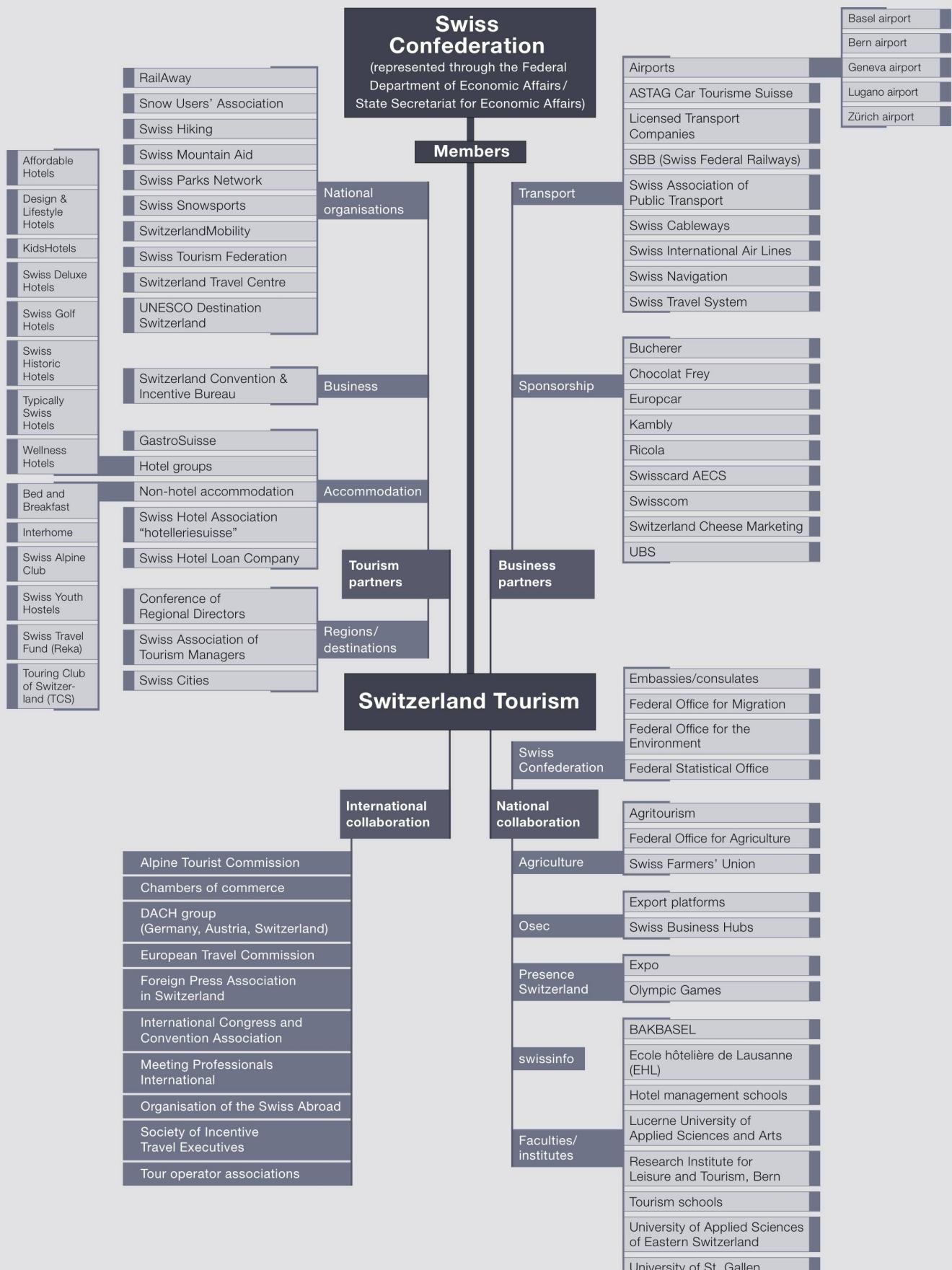


## Making learning fun.

“Enjoy Switzerland”, ST's programme for product development and service quality, gives Lenk-Simmental a striking and original profile with its “AlpKultur” project. One outcome is the playground, opened in 2011, which offers a fun experience of alpine life down at valley level.

# The ST network, basis for success.

Through its network, ST forges links between suppliers and tour operators, politics and business, and between state and private organisations and training institutions.



# Tourism marketing: a modular approach.

ST is known for its polished, persuasive, globally orchestrated marketing campaigns. It offers partners many options for participation.

Collaboration with ST can cover the free basic marketing package, additional activities in the markets or specific services relating to distribution and monitoring – all the way up to individual marketing strategies. In 2011, 798 partners invested around 24.4 million Swiss francs in shared marketing activities with ST.

## Comprehensive and free of charge

Through the Swiss Confederation's basic mandate, all tourism service providers benefit from many of ST's core marketing activities. These include a global market and media presence through ST's representations in 26 countries, and the provision of information to visitors via MySwitzerland.com. ST shares knowledge, findings from market research and crisis communication skills, and promotes quality development in the sector.

## Opting for expertise and quality

ST relies on collaboration with suitable Swiss partners regarded as skilled service providers in their field, guaranteeing a high level of quality. This applies not just to the main campaigns and theme products, but also to hotel groups structured to meet specific customer requirements, such as the Wellness Hotels, KidsHotels, Design & Lifestyle Hotels and Typically Swiss Hotels. Specific interests in the meetings sector are handled by the Switzerland Convention & Incentive Bureau (SCIB), which offers help with planning events in Switzerland to organisers of conferences, meetings and incentives anywhere in the world. SCIB also markets Switzerland's leading conference destinations and venues.

## Individual concepts, boldly implemented

With its partners – destinations, regions, transport companies and hotel groups – ST takes on individual projects, creating tailored concepts for implementation as specific marketing activity.

Individual programmes	Destinations	Regions	Transport	Hotel groups, tourism groups
<b>Specific cooperation alliances</b>	Campaigns Summer Winter Cities Meetings Theme products	Hotel products Typically Swiss Hotels Wellness Hotels KidsHotels Design & Lifestyle Hotels Swiss Historic Hotels Swiss Deluxe Hotels Swiss Golf Hotels Affordable Hotels	Interest groups SCIB Swiss Cities SwitzerlandMobility Swiss Snowsports Non-hotel accommodation Switzerland CH7/A+*	Family resorts Public transport Top Events of Switzerland Enjoy Switzerland/ Swiss Mountain Aid
<b>Specific sector services</b>	Mailing house Brochure production Data management Tourism Monitor Switzerland			MySwitzerland.com for you e-CRM for you Holiday home marketplace
<b>Additional market presence</b>	Trade fairs Media events Market cooperation alliances			Switzerland Travel Experience (STE) Roadshows/workshops Special offers
<b>Basic marketing (basic mandate)</b>	International market presence and market development International media presence Sales channels/account management Web presence Customer information Business development			Switzerland brand Market/trend/product research Advice, coaching on campaign and product marketing Sector intranet (STnet) Promotion of quality/Enjoy Switzerland

\* CH7/A+ denotes the group of seven cities: Basel, Bern, Geneva, Lausanne, Lucerne, Lugano and Zürich

## Facts and figures.

Collaborations within the tourism sector	2011	2010
Participating partners*	798	749
Members**	687	684
Marketing income from partners	CHF 24.38 m	CHF 23.09 m

\* including collaborations with hotels

\*\* A list of all current partners can be viewed at [www.stnet.ch/members](http://www.stnet.ch/members)



## The many benefits of ST membership.

ST members not only benefit from access to ST's marketing, but also gain strategically vital knowledge and a profitable business network.

ST membership costs 1,780 Swiss francs, and provides numerous opportunities for participation with ST (see page 11). Through the partner website STnet.ch members receive access to strategic information such as the business plan and medium-term planning, as well as market and tourism industry data. Members are listed on the online portals STnet.ch and MySwitzerland.com as partners, and may use the "Switzerland Tourism. Member." logo. In addition, partners benefit from an enhanced market presence internationally, through the various

opportunities for collaboration, and through integration in ST's media work.

### Getting to know visitors

The visitor questionnaire Tourism Monitor Switzerland (TMS, pages 40 and 41), systematically developed over recent years, keeps ST members fully up-to-date with market research. They can access findings obtained from the TMS on STnet.ch as an online analysis tool and also in processed form in numerous reports. TMS data offers a detailed understanding of the behaviour, preferences and opinions of visitors to Switzerland. Members can use these findings free of charge for their own market positioning, and apply the insights profitably in their marketing activity.

### Industry events

#### 14th Switzerland Vacation Day.

On 3 May in Geneva, 1,231 tourism professionals came together at the 14th Switzerland Vacation Day, the largest ST industry event of the year, to discuss developments in the sector. Themes included diversification of the clientele, changing patterns of travel among visitors and the use of new marketing channels such as social media.



Experts at the 14th Switzerland Vacation Day in Geneva.

Above: Federal Councillor Johann N. Schneider-Ammann.

#### 2nd Hotel Marketing Day.

Every two years, ST and the Swiss Hotel Association "hotelleriesuisse" organise the Hotel Marketing Day to facilitate an exchange of views on developments in the field. In 2011 ST worked with 474 hotel partners; from them, 300 delegates came to this year's Hotel Marketing Day in Lucerne to discuss aspects of social media, websites and hotel rating schemes with e-marketing experts.



Below (left to right): Thomas Winkler, ST's Head of Portal Management and E-marketing; Prof. Dr. Miriam Meckel, director of the MCM Institute at University of St. Gallen; panel chairman Kurt Aeschbacher; Dr. Peter Felser, CEO of Spillmann/Felser/Leo Burnett AG.



## Facts and figures.

Strategic partnerships	2011	2010
Strategic partners	12	13
Official partners	17	19
Revenue from sponsorship*	CHF 10.45 m	CHF 10.45 m

\*including barter arrangements

## Strategic partnerships.

ST carries out marketing activities with prominent strategic partners that embody Swiss quality, thereby strengthening Switzerland as a brand and the country's visibility worldwide.

ST offers its strategic partners attractive platforms for the global marketing of their products and services. The synergies that result from bringing together ST, with its experience in worldwide tourism marketing, and the strategic partners, with expertise and contacts in their own sectors, benefit all through access to new markets and channels of communication. Switzerland as a brand is strengthened, and made more visible internationally. The partnership established in 2010 with UBS in Switzerland is a successful example of such teamwork, extended in 2011 to take on an international dimension.



### Swiss winner.

The UBS competition that ran in the "Top 100 Experiences" brochure had a big response. To enter, readers had to visit four featured attractions and have their competition card stamped at each one. About 40,000 cards were filled in and submitted, corresponding to roughly 160,000 excursions undertaken throughout Switzerland – thanks to the brochure.

### Gruyère discovery.

The historic "Route du Gruyère AOC" from Gruyères to Lyon was revived in May by Switzerland Cheese Marketing and Le Gruyère AOC. With these two partners, ST France helped give the La Gruyère region a powerful platform at the Village Suisse in the heart of Lyon – with Switzerland promotions, media conference, 10,000 brochures distributed and 3.5 million media contacts.

### Epic adventure.

More than 50,000 fans followed the American mountaineer John Harlin on his unusual quest: a 2,000-km journey along Switzerland's frontiers. The popular "Swiss Borders" project was produced jointly by swissinfo.ch and ST. Images of Poschiavo, Gandria and Gondo went around the world as enthusiasts accompanied Harlin live via swissinfo.ch and Facebook.

## Hotel overnights.

	Overnights 2011	Overnights 2010	Change	Change (%) + -	Market share (%)
<b>Priority markets</b>	<b>27,466,525</b>	<b>28,527,573</b>	<b>-1,061,048</b>	<b>-4.0 %</b>	<b>77.4 %</b>
Switzerland	15,752,367	15,765,304	-12,937	-0.1 %	44.4 %
Germany	5,207,892	5,816,520	-608,628	-10.5 %	14.7 %
UK (with Ireland)	1,765,012	1,926,046	-161,034	-8.4 %	5.0 %
France	1,394,166	1,449,278	-55,112	-3.8 %	3.9 %
USA	1,492,131	1,506,435	-14,304	-0.9 %	4.2 %
Italy	1,007,519	1,074,447	-66,928	-6.2 %	2.8 %
Netherlands	847,438	989,543	-142,105	-14.4 %	2.4 %
<b>Active markets</b>	<b>3,067,138</b>	<b>3,142,368</b>	<b>-75,230</b>	<b>-2.0 %</b>	<b>8.6 %</b>
Belgium (with Luxembourg)	793,538	876,601	-83,063	-9.5 %	2.2 %
Nordic countries (Denmark, Finland, Norway, Sweden)	537,138	543,744	-6,606	-1.2 %	1.5 %
Austria (with Hungary)	484,630	497,172	-12,542	-2.5 %	1.4 %
Japan	479,743	507,138	-27,395	-5.4 %	1.4 %
Australia (with New Zealand and Oceania)	270,650	253,026	17,624	7.0 %	0.8 %
Canada	228,137	225,140	2,997	1.3 %	0.6 %
Korea (Rep.)	167,866	135,377	32,489	24.0 %	0.5 %
Czech Republic	105,436	104,170	1,266	1.2 %	0.3 %
<b>Strategic growth markets</b>	<b>2,866,075</b>	<b>2,523,482</b>	<b>342,593</b>	<b>14.0 %</b>	<b>8.1 %</b>
China	677,220	477,425	199,795	41.8 %	1.9 %
Russia	513,754	467,884	45,870	9.8 %	1.4 %
India	460,440	392,852	67,588	17.2 %	1.3 %
Spain	451,463	449,824	1,639	0.4 %	1.3 %
Gulf states	418,609	423,438	-4,829	-1.1 %	1.2 %
Brazil	194,492	168,771	25,721	15.2 %	0.5 %
Poland	150,097	143,288	6,809	4.8 %	0.4 %
<b>Developing markets</b>	<b>416,990</b>	<b>390,516</b>	<b>26,474</b>	<b>7.0 %</b>	<b>1.2 %</b>
Israel	163,041	155,512	7,529	4.8 %	0.5 %
Singapore	109,974	104,563	5,411	5.2 %	0.3 %
Thailand	93,402	85,851	7,551	8.8 %	0.3 %
Malaysia	50,573	44,590	5,983	13.4 %	0.1 %

Overnights at Swiss hotels and health establishments (by selected countries of origin, in some cases accumulated)

Source: Federal Statistical Office, 2010 and 2011

## Solid result despite difficult conditions.

In 2011 the European debt crisis made for a difficult economic background. Swiss hotels and resorts rose to the challenge, however, achieving 35.4 million overnights\* – a respectable result in a difficult competitive environment. This corresponds to a decline of -2.0 % with respect to the preceding year. At the same time, Switzerland was able to welcome more visitors than ever before, with 16.2 million arrivals. New impetus came above all from the strategic growth markets: here, the sector was able to increase the number of arrivals by +268,000 (+23 %), and the number of overnights by +343,000 (+14 %). The greatest growth came from China

(+200,000 overnights), India (+68,000 overnights) and Russia (+46,000 overnights).

With 15.7 million overnights (-0.1 %), the domestic market proved itself once again to be a central pillar of the Swiss tourist industry. In contrast, the strong franc significantly weakened results from near markets in Europe. The number of overnights from Germany fell by 10 % to 5.2 million; the results from Italy (-6 %), France (-4 %) and the Netherlands (-14 %) were also strongly affected by the debt crisis. Switzerland's mountain regions suffered especially, with a fall in the number of overnights of -5 %.

The cities, however, were able to stand up well to international competition, with growth of +1.6 %.

\* Source: accommodation statistics, Federal Statistical Office

### Three factors that characterised the year:

- stable domestic market
- marked decline in the figures from the eurozone and the UK
- large differences between mountain areas and cities

# The consequences of the strong Swiss franc.

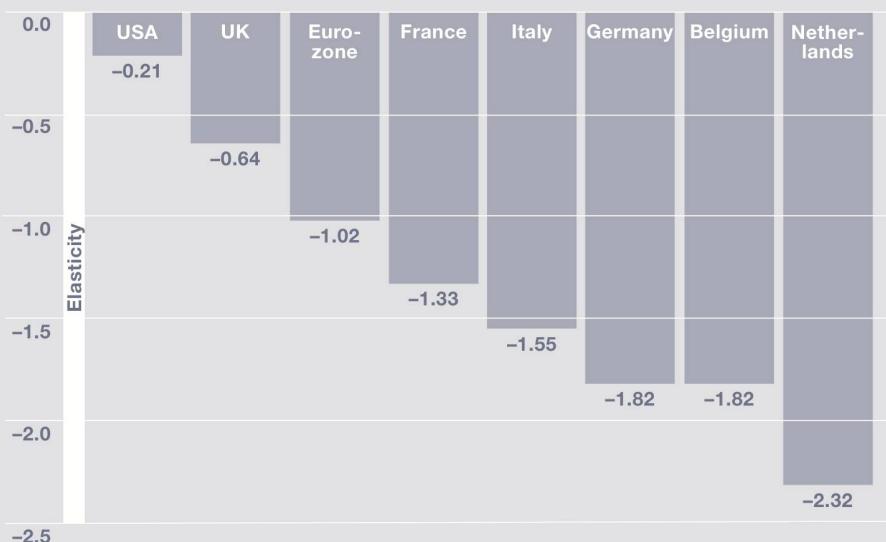
Alongside the overall economic situation (including e.g. changes in income and consumer confidence), the strength of the Swiss franc has a major effect on the number of overnights by foreign guests. Visitors from certain markets react more strongly than others to variations in exchange rates. The magnitude of this response is measured in terms of exchange rate elasticity. Near markets in Europe are strongly influenced by the exchange rate effect. These react more sensitively than distant markets to changes in exchange rates. The effect is especially marked in the Netherlands and Germany, for example, while the French are less price-sensitive. The British, meanwhile, have also suffered a large

drop in spending power: their currency has lost about 30 % of its value compared with the Swiss franc in the past three years.\* The number of overnights has fallen correspondingly.\*\* Distant markets, meanwhile, such as the USA, have proven to be encouragingly stable. Here, the reaction to changes in exchange rates is clearly reduced. One reason is the lack of alternative options for distant markets: it is easier for European visitors to switch to alternative destinations in the Alps, for example.

\* Oanda.com, 2/2012

\*\* -26 % compared with 2008. Source: accommodation statistics, Federal Statistical Office, 2011

## Long-term exchange rate elasticity of overnights from selected countries of origin



Source: KOF Swiss Economic Institute, ETH Zürich 2011. Explanation: an elasticity of -1 means the number of overnights from that market falls long-term by 1 % when the Swiss franc rises in value by 1 % (i.e. the Swiss franc becomes more expensive for foreigners)

## Overall results.

The majority of overnights in Switzerland are generated by non-hotel accommodation. Business declined in the sector of rented holiday apartments and camp sites.\* Slight growth, meanwhile, was registered by Swiss Youth Hostels and Reka holiday villages.\* Service providers in the bed-and-breakfast sector achieved a positive result as well.\* The number of overnights in second homes also increased.\*\* In the day-trip sector, results remained at the level of the preceding year.\*\*\*

### Sector

#### Non-hotel accommodation\*

- Second homes →
- Holiday apartments ↘
- Youth hostels and Reka →
- Camp sites ↘
- Bed & breakfast →

#### Change

#### Hotel accommodation

#### ↘

#### Day excursions

#### →

\* Source: non-hotel accommodation Switzerland

\*\* Source: ST estimate based on changes in accommodation capacity in Switzerland (Fif Research Institute for Leisure and Tourism 2011)

\*\*\* Source: ST tourism sector questionnaire 2011