

Marketing strategy

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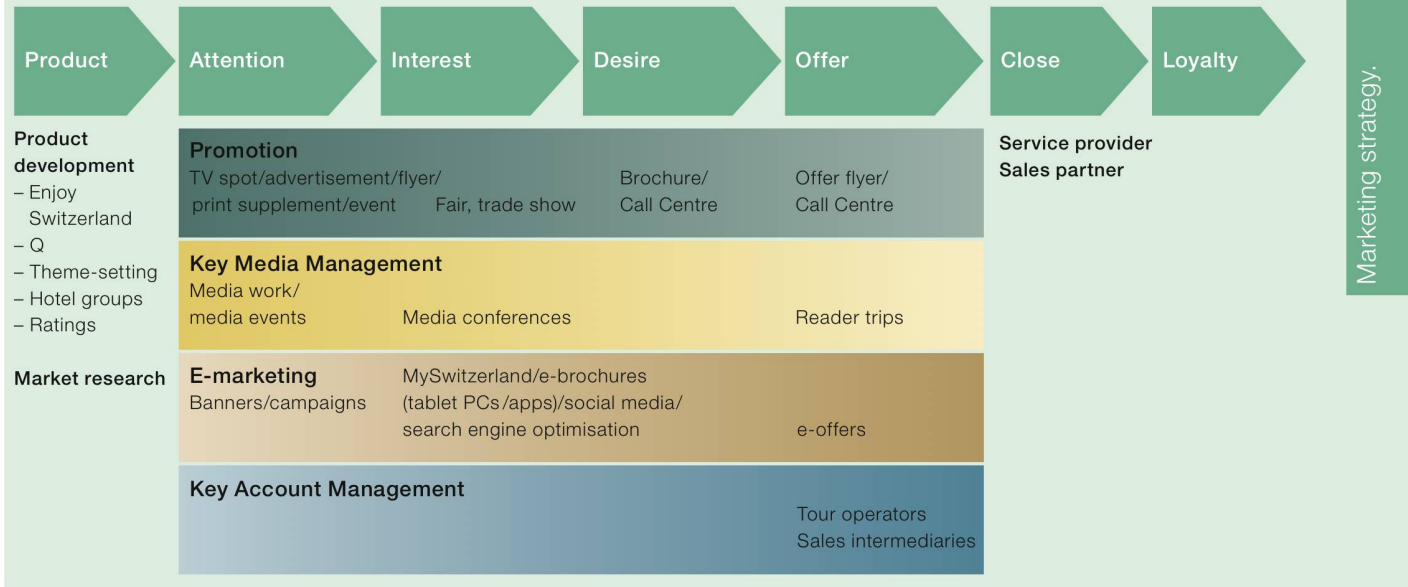
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Marketing strategy.

Integrated ST Marketing.



Attention is precious. Winning it, converting it to sales and earning customers' loyalty is ST's core responsibility. To achieve this, ST uses the so-called "four-wheel drive" (from page 19), which allows a flexible, market-specific marketing mix.

ST's marketing campaigns.

With its main campaigns and theme products, ST offers visitors clearly structured products oriented to their needs – with an emphasis on quality.

ST promotes Switzerland throughout the world by means of its main product campaigns – Summer, Winter, Cities and Meetings – as well as theme products. A central feature is the marketing of clearly positioned hotel groups and non-hotel accommodation. The hotel groups are oriented to visitors' requirements: Design & Lifestyle, family holidays, history, golf, luxury, "typically Swiss", wellness, etc.

The clearly demarcated contents of these main campaigns, theme products and collaboration with hotels provide maximum guidance for visitors, who can easily find their way to attractive offers from campaign partners – and to any information they may need. This model is supported by an all-round drive for quality.



Spreading risk, developing potential.

ST's market portfolio is under constant evaluation, and takes account of global economic perspectives and developments.

International travel patterns are in a state of constant flux. ST seeks out potential in new markets seeing rapid growth in the numbers of citizens travelling abroad. Most of our guests, however, are still from Switzerland and neighbouring countries.

Priority markets: high investment

ST maintains its own representations in France, Germany, Italy, the Netherlands, Switzerland, the UK (with Ireland) and the USA, for the optimal management of these markets – which account for 77.4 % of all overnights.

Active markets: tailored marketing mix

ST adopts an individual mix of marketing strategies in Australia (with New Zealand and Oceania), Austria (with Hungary), Belgium (with Luxembourg), Canada, the Czech Republic, Japan, Korea (Rep.) and the Nordic countries.

Strategic growth markets: exploiting potential

ST invests disproportionately in the up-and-coming, high-potential markets of Brazil, China, the Gulf states, India, Poland, Russia and Spain.

Developing markets: strong local mandate

In Israel, Malaysia, Singapore and Thailand, ST works by mandate with embassies and with SWISS.

ST markets.	Number of staff	Media reports generated	Visits to MySwitzerland.com	High-value customer contacts	Marketing contacts
Priority markets					
France	10	547	1,587,901	144,852	222,751,264
Germany	17	3,132	2,303,673	326,836	1,095,032,387
Italy	9	1,200	1,732,131	178,000	660,000,000
Netherlands	8	325	987,885	190,000	133,009,950
Switzerland	120	559	10,702,890	390,128	284,928,985
UK (with Ireland)	10	1,252	928,320	168,128	339,011,959
USA	16	665*	1,580,357*	98,886*	127,586,321*
Active markets					
Australia (with New Zealand and Oceania)	1	130	184,048	8,500	5,500,000
Austria (with Hungary)	2	426	193,733	6,600	28,392,628
Belgium (with Luxembourg)	4	628	674,138	45,000	53,039,802
Canada	2	inc. with USA	inc. with USA	inc. with USA	inc. with USA
Czech Republic	(1)	270	105,375	61,000	8,530,000
Japan	8	167	600,992	44,895	340,237,783
Korea (Rep.)	2	310	259,868	51,495	161,056,700
Nordic countries (Denmark, Finland, Norway, Sweden)	(1)	60	164,285	22,000	8,000,000
Strategic growth markets					
Brazil	(1)	35	79,000	20,000	6,675,000
China	10	767	288,633	179,814	47,264,000
Gulf states	2/(1)	101	73,463	2,850	10,140,980
India	1/(4)	80	367,233	50,000	220,000,000
Poland	(1)	90	224,418	35,000	45,000,000
Russia	5	300	214,203	12,127	210,202,380
Spain	4	277	669,988	29,800	31,000,000
Developing markets					
Israel	(1)	55	61,379	1,000	980,000
South East Asia (Malaysia, Singapore, Thailand)	(3)	15	129,340	0	3,000,000

* including Canada

() mandated staff

ST criteria set for market assessment.

ST constantly reviews its existing market portfolio in order to identify early any relevant change in market conditions worldwide – and to spot new potential. Decisions are made on the basis of market research data, expert interviews and the ST criteria set, which permits sophisticated analysis of each individual market according to 13 influencing factors.

Criterion	Definition
Economy	Economic situation, consumer confidence, inflation, unemployment
Currency	Rate of exchange with the Swiss franc
Dependency on oil	Mobility costs, fuel surcharges, alternative means of transport
ST substitution	Possibility of ST activities being taken over by tourist partners within the market (language, distance, development, etc.)
Repeat visitors	Proportion of repeat visitors (a high proportion corresponds to lower marketing costs incurred in persuading customers)
Costs of developing the market	How expensive is it to produce promotional material (language), how high are travel, personal and business operational costs, how high are taxes, etc.?
Market access	How good are the connections between the market and Switzerland (direct flights, rail, driving distances, etc.), what are the visa requirements?
Market attractiveness	Calculated with the McKinsey model
Competitive advantage	Calculated with the McKinsey model
Effectiveness of ST activities	Results of ST's effectiveness measurements 2009/2010
Seasonal attractiveness	Visitors who come between seasons or in summer are of greater potential benefit than those who come during the main winter tourist season. Source markets with more summer visitors than winter visitors are rated more highly
Growth potential	Growth prospects in the next two years according to Oxford Economics, Tourism Decision Metrics
Daily spending	Average daily expenditure according to ST's effectiveness measurements 2009/2010

Four elements for a full marketing mix.

ST follows a marketing model that permits client-focused and success-oriented implementation of a variety of tools, according to the demands of each market.

Promotion: winning attention and persuading

ST's promotion mix ranges from advertising to events, trade fairs and mailings. In 2011, ST prepared the way for a new method of conveying information: print brochures awaken a desire for Switzerland, digital tablets provide the relevant details.

E-marketing: Switzerland on the screen

ST's global storefront is the MySwitzerland.com website, relaunched in 2011. Successful e-marketing requires precise knowledge of customer needs; ST's comprehensive contact database enables targeted cross-marketing in the form of electronic newsletters and tailored online promotions. Through social media, ST can enter into direct and open

dialogue with potential visitors, creating customer proximity and trust.

Key Media Management: high credibility

ST maintains open dialogue with media worldwide, in the form of personal background briefings, research assistance, themed media trips and media conferences. The published articles which result about holidaying in Switzerland carry an incomparably high degree of credibility. Campaigns and partners are continually integrated in media reports.

Key Account Management: strong sales partners

Within the markets, ST relies on suitable partners for selling Swiss holidays: selected tour operators, leading conference organisers and successful travel agents. Using succinct business plans, ST is able to help travel agents win new customers and additional business.

Facts and figures.

Promotion	2011	2010
Advertising & marketing contacts*	4.04 bn	3.63 bn
Brochures distributed**	58.79 m	49.95 m
High-value customer contacts***	2.07 m	1.66 m

* Contacts resulting from paid advertising (banners, posters, TV ads, events, etc.)

** Proactive distribution of advertising material (inserts, flyers, etc.)

*** Number of contacts via the Call Centre (telephone calls, e-mails, letters), brochure orders and downloads, respondents via MySwitzerland.com, STC and tour operators, and e-newsletter subscribers



Promotion.

ST uses a full range of promotional techniques to market Switzerland worldwide. Original campaigns, supplements, trade show appearances, TV adverts and special offers all attract attention.

Inspiration above the clouds.

About 1.9 million airline passengers flying worldwide in September with SAS Star Alliance received inspiring ideas for winter holidays in the Engadin St. Moritz region. A supplement with the inflight magazine "Scanorama" covered winter sports and rail adventures, focusing especially on cross-country skiing, the fastest-growing sport in Nordic countries. Engadin St. Moritz was an ideal fit – and SAS's readership the perfect audience.



Switzerland films online.

The easiest way to convey emotions and stories to an audience is through moving pictures.

With this in mind, ST is building up its film archive, supporting the tourism sector by producing material that can be used in a wide variety of ways. More than 1,500 videos – finished clips as well as raw footage – have been filed online in the new Video Library. That amounts to more than 140 hours of film from every corner of the country. ST's worldwide marketing of the regions and destinations makes use of this Video Library, which is also available to the media and to tourist organisations.



Shooting a publicity film for the resort of Scuol (Motta Naluns ski area), which can be found on the Video Library.



A sensuous Swiss journey – in Spain.

At "Suiza abre sus puertas" – ST's biggest campaign in Spain to date – Switzerland literally opened its doors to guests in Barcelona and Madrid. Four enormous doorways, six metres high and artfully made, welcomed visitors to Geneva and Zürich, into the Valais and on an impressive rail journey, each experience accompanied by fresh sensations: the scent of Swiss flowers, the sound of typical Swiss music, the sight of videos and other images. It proved to be a highly popular project: 85,000 potential visitors stepped through the doors and carried home impressions of Switzerland; 35,000 also took away a brochure, while 8,000 callers asked at the information stand for details of specific offers.



Facts and figures.

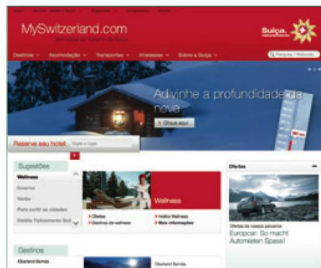
E-marketing	2011	2010	E-marketing	2011	2010
MySwitzerland.com					
Web visits per day	68,809	66,520	Partner websites	67	66
Web visits per year*	25.12 m	24.28 m	e-CRM partners	21	18
Languages	16	16	Newsletter subscribers	526,000	484,000
Hotels	1,854	2,083	Newsletters sent	9.2 m	9.3 m
Holiday apartments	24,193	26,934	Downloads of the		
*WEMF-certified			11 iPhone apps	1.16 m	700,000
			Social media contacts	170,000	–

E-marketing.

Digital communication has become an indispensable part of the ST marketing mix. It extends from the new MySwitzerland.com website to e-newsletters, iPhone apps and extensive involvement in social networks.

A new look for the ST website.

With about two million visits a month, ST's online portal MySwitzerland.com is Switzerland's most popular tourism website. In June it received a fresh new look. Featuring an information-oriented design for tailor-made pages, it is more interactive and user-friendly than ever. The conversion of the site's 14,000 pages to the new look revealed the versatility of today's digital formats. MySwitzerland.com carries information at striking speed – in both directions. For example, the consequences of the strengthening franc were felt immediately: the number of website visits fell sharply in parallel with the value of the euro, touching a low



point in mid-August when the franc reached parity with the euro. Exchange rates, in other words, have a clear effect on tourist demand.

A new design for the newsletter.

ST's logical next step after the redesign of MySwitzerland.com was to relaunch the newsletter.



Incorporating stylistic elements from the new website, it is accessible, user-friendly and easy to navigate, with a clear layout making use of modular theme blocks.

Facebook: promoting web-free breaks.

The most trusted marketing instrument in tourism is personal recommendation. For this, social media is a perfect fit, allowing users to share personal experiences. Such was the basis for ST's most successful online campaign to date, the Facebook competition "Holidays without Internet". Through an interactive chat with the protagonists of ST's TV ads Sebi and Paul (more on page 26, for example), online visitors competed to win a holiday in a remote mountain hut lacking both mobile phone reception and Internet connection. The page received more than 398,000 hits – at peak times about 16,000 a day. 18,290 visitors entered the competition, and 53,832 new fans registered themselves on ST's Facebook page through the campaign.



Facts and figures.

Key Media Management	2011	2010
Media contacts	8.78 bn	8.67 bn
Media reports generated	11,391	10,246
Participants on ST media trips	2,068	2,047
TV teams	115	104
Media conferences	82	84



Key Media Management.

ST prioritises dialogue with the media: editorial mentions carry great credibility. ST offers support with research, promotes campaign-related story ideas and organises media conferences and trips.

GEO's Tour de Suisse.

ST works with major travel magazines, devising special editions which give prominence to Switzerland. In their "La Suisse" issue, GEO France, with 375,000 readers in France and other francophone countries, showcased a journey to Switzerland, demonstrating the country's great variety from Watch Valley to the North Face of the Eiger. It was their first to be available in iPad format, too.



Cameras flash around the world's longest alphorn during the evening event in Interlaken marking the start of the international media trip.

Travel media on the move.

The best picture of Switzerland is created by visiting journalists – for example, on the annual international media trip. 144 media representatives from 28 countries travelled to the Jungfrau Region as a primary destination, before going on to seven other regions. The effort is well worthwhile: the editorial which results from the trip reaches between 90 and 100 million media contacts, with an equivalent advertising value of about five million Swiss francs.



From left: Fritz Reimann, Editor, Swiss TV; Daniela Bär, ST's Head of International Media and Corporate Communication; star NBC presenter Matt Lauer; Alex Herrmann, ST's Americas Director.

"Top of Europe" mystery on NBC.

Every year the legendary US TV presenter and host of NBC's Today show Matt Lauer sets off on a week-long journey around the world. In "Where in the world is Matt Lauer?", he visits five locations, giving viewers clues as to where he might be – and encouraging them to guess. This year, his journey took him from Namibia via Spain and Malaysia to the Jungfrauoch ("Top of Europe"). Lauer's live broadcast on 10 November reached eight million breakfast viewers, a market share of 35%. Highlights included games with a St. Bernard dog, an open-air fondue, an interview with extreme mountaineer Ueli Steck, yodelling and displays of flag-throwing, all at 3,500 metres. ST made it possible, in close collaboration with Jungfrau Railways.



Facts and figures.

Key Account Management	2011	2010
KAM-generated overnights	4.31 m	4.60 m
Tourism turnover*	CHF 1.07 bn	CHF 1.18 bn

*KAM-generated overnights, multiplied by the daily spending for the relevant country

Key Account Management.

Visitors from distant markets mostly book holidays through travel agencies. ST therefore works closely with tour operators to extend Switzerland's presence in brochures, at travel trade fairs and in workshops.



Maurus Lauber (right), Swiss Travel System's CEO, with a travel agent from India.

North America meetings.

For Switzerland as a conference destination, the IMEX trade fair in Frankfurt is one of the leading events. In 2011 for the first time, an offshoot IMEX was held in Las Vegas for the North American meetings and incentive market. Switzerland Convention & Incentive Bureau (SCIB) North America was there with ten Swiss partners. Thanks partly to IMEX Las Vegas, in 2011 alone SCIB was able to bring 31 events to Switzerland.

Shopping for Switzerland.

At the end of April, 369 tourism service providers from around Switzerland attended the Switzerland Travel Mart (STM) at Palexpo in Geneva to meet 434 tour operators from 44 countries – representing 800 million Swiss francs of business for Switzerland – and showcase their Swiss holiday products. The result: 262,000 additional overnights, and a direct sales increase of nearly 68 million Swiss francs.



The creators of the Premium Switzerland programme at its launch: Teresa Perez (right), owner of the eponymous tour operator, with Gisele Sarbach, ST Brazil's Market Manager.

Premium Switzerland for Brazil.

In ST's market portfolio, Brazil is a strategic growth market. To reach potential visitors, ST collaborated with the Brazilian luxury tour operator Teresa Perez to produce the "Switzerland Traveller Guide", a high-quality 130-page magazine positioning the country as a premium travel destination and presenting a variety of exclusive tours and holiday ideas. With a print run of 54,000 copies, and also produced in iPad format, the guide was distributed from late September to leading travel agents and key customers as well as to First and Business Class passengers on SWISS. Success came quickly: within three months, Teresa Perez sold as many holidays to Switzerland as in the whole year before the campaign.

Facts and figures.

Impulse programme	Summer (May to October 2011)
Spending	CHF 11.23 m
Federal funding (out of a total of CHF 12 m)	CHF 6.62 m
Funding from ST	CHF 2.50 m
Funding from tourism and industry partners	CHF 2.11 m
Plus: cash payments and benefits in kind from third parties, to a value of about CHF 6 m	
Marketing contacts*	1.38 bn
High-value customer contacts*	596,788
Additional turnover*	CHF 219 m
Additional generated overnights (all channels)*	981,000
Participating partners	339
Target markets	AU, BR, CA, CH, CN, DE, FR, GCC, IN, IT, NL, PL, RU, UK

* Summer: stage 1 (Switzerland) and stage 2 (Switzerland, near markets, distant markets)

Global impulse programme.

With the 2011 impulse programme, ST, the Confederation and the industry joined forces to cushion tourism from the negative effects of the strong franc.

In June, parliament awarded ST valuable additional funds for 2011–2012. The tourism sector also contributed to this special impulse programme. ST invested these funds in product marketing – in collaboration with tour operators, producing inserts, special publications and supplements, and creating reader offers, online promotions and other special deals. The goal was to stimulate demand at home, and also to win additional overnights in markets that were unaffected (or relatively so) by the strong franc, such as Brazil and Poland.

From left: Mariana Alcorta, Head of Marketing at Panrotas, Brazil's leading player in travel trade media; Urs Eberhard, ST Executive Vice President; Gisele Sarbach, Market Manager at ST Brazil; Martin Jensen, CEO of tour operator Queensberry Viagens.



More Swiss trips.

Brazil ST expects 16,000 additional overnights as a result of measures taken in Brazil – principally through intensive collaboration with tour operators that previously did not or only barely featured Switzerland in their brochures, and through aggressive promotion of new programmes with both premium and standard products (as with Teresa Perez, see page 23).

All channels used.

Poland In what is otherwise a difficult European environment, Poland is showing stable development. Here the impulse funds were used broadly – a brochure inserted into high-circulation publications, top deals translated into Polish for the first time on MySwitzerland.com, online campaigns on major Polish portals and expansion of relevant tour operators' Switzerland programmes.