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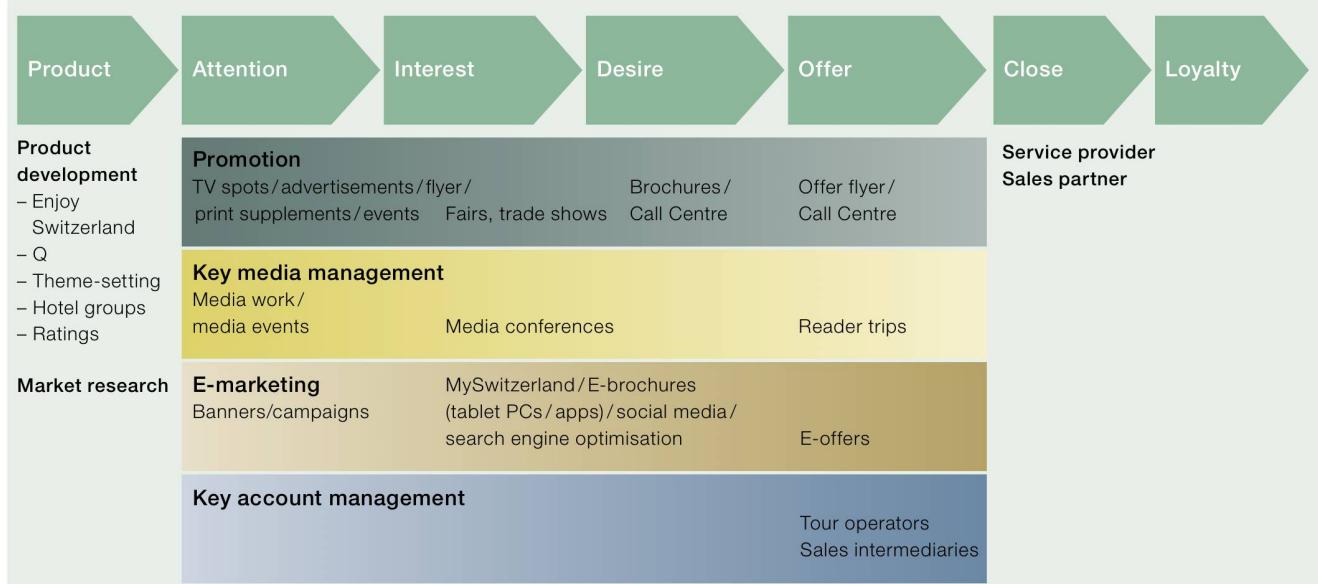
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Marketing strategy.

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 clear demarcation of these main campaigns, theme products and hotel collaborations provides maximum guidance for visitors, who can easily access attractive offers from campaign partners – and any information they may need. This model is supported by an all-round drive for quality.

Integration in ST marketing campaigns.



Strong in the growth markets.

Nearly all growth markets expanded greatly in 2012. This was not, however, sufficient to offset decline in the Eurozone.

Although visitors from the priority markets may be tempted by cheaper prices in other countries, they still represent the largest visitor segment by a wide margin.

Priority markets: intensive development

In France, Germany, Italy, the Netherlands, Switzerland, the UK and the US, ST maintains its own representations for the optimal management of these markets – which account for more than 76 % of all overnights.

Active markets: individual marketing mix

In Australia, Austria, Belgium, Canada, the Czech Republic, Japan, Korea, the Nordic countries, Spain, and newly in Southeast Asia with an office in Singapore, ST is focusing on e-marketing activities, media work and collaboration with tour operators.

Strategic growth markets: high visitor growth

In Brazil, China, the Gulf states, India, Poland and Russia, ST is reckoning on visitor growth totalling 20 % over the next five years, and is therefore investing disproportionately heavily in these markets. All strategic growth markets, apart from Poland, displayed a clear upward trend in 2012.

ST markets.	Number of staff	Media reports generated	Visits to MySwitzerland.com **	High-value customer contacts	Marketing contacts
Priority markets					
France	10	607	1,553,894	150,088	493,288,501
Germany	16	3,319	2,534,611	318,762	1,730,925,132
Italy	9	1,224	1,904,085	183,382	626,241,060
Netherlands	8	486	858,527	234,260	108,913,273
Switzerland	126	736	11,304,196	402,092	359,000,000
UK (with Ireland)	10	1,217	954,734	185,960	158,893,549
USA	16	739*	1,882,848*	98,047*	101,963,318*
Active markets					
Australia (with New Zealand and Oceania)	1/(2)	151	173,285	14,900	20,050,000
Austria (with Hungary)	1/(1)	473	174,979	6,600	29,470,278
Belgium (with Luxembourg)	4	677	604,232	50,000	43,166,611
Canada	2	inc. with USA	inc. with USA	inc. with USA	inc. with USA
Czech Republic	(1)	309	102,696	70,000	9,000,000
Japan	8	155	720,623	43,419	335,324,479
Korea (Rep.)	3	386	256,620	80,000	435,170,346
Nordic countries (Denmark, Finland, Norway, Sweden)	(2)	62	158,348	30,000	19,000,000
Southeast Asia (Malaysia, Singapore, Thailand)	1/(4)	28	190,794	1,200	2,869,675
Spain	4	218	639,909	22,000	23,000,000
Strategic growth markets					
Brazil	1/(2)	22	117,243	47,500	8,592,000
China	11	956	332,971	339,500	77,510,000
Gulf states	3	98	103,023	4,122	40,105,327
India	1/(4)	96	309,269	80,000	60,000,000
Poland	(2)	100	217,164	40,000	70,000,000
Russia	5	673	240,294	22,190	173,162,555
Developing market					
Israel	(1)	44	55,373	1,200	1,000,000
Others					
			1,004,195		

* Including Canada

** Figures including impulse programme (remaining figures excluding impulse programme)

() Mandated staff

Multistage market assessment.

ST constantly reviews its existing portfolio, analysing each market according to 13 criteria to identify any change in market conditions early – and to spot new potential.

How high is a country's consumer confidence? How attractive is the exchange rate? How great is its dependency on oil? These questions all form part of the regular market assessment, along with reviews of local partner skills, market development costs and ease of market access. Market attractiveness and competitive advantage are calculated with the McKinsey model, and growth potential according to Oxford Economics. ST's effectiveness measurements complete the picture.

“Market diversification is not a magic formula but a necessity.”

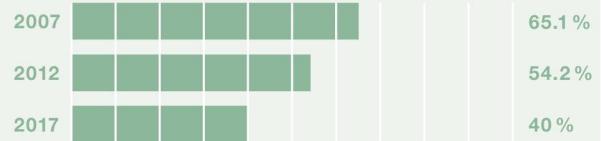
Urs Eberhard,
Vice Director, Director Markets & Meetings

Marketing: four key elements.

ST's marketing model allows for the flexible implementation of various tools, according to market requirements.

Promotion: stimulating interest.

The promotion mix ranges from advertising to events and mailings. Print products aim primarily to make an emotional connection with the reader. Top-quality images stimulate curiosity; text is reduced to expert tips, omitting so-called “generic content”. Readers are directed online for more detailed information.



E-marketing: conducting dialogue.

Global electronic networks offer tremendous potential. ST is boosting communication by social media and meeting the growing demand for information on the move with the development of consumer-oriented apps. ST is also driving a shift from print brochures to multimedia platforms, especially iPad apps.



Key media management: helping the media.

Editorial features are becoming ever shorter, journalists' time ever tighter. ST is countering this by providing individual, media-specific information, media trips and by communicating proactively via social media channels. Prompt responses to requests and a personal, professional approach with contacts remain top priorities.



Key account management: creating tours.

As well as conducting shared marketing measures with Swiss and foreign tour operators, ST places special focus on developing attractive new theme routes and products. In a new development, effective 2013, ST will coordinate collaboration with the most important tour operators worldwide centrally from its headquarters in Zürich.



Facts and figures.

Promotion	2012	2011
Advertising & marketing contacts*	4.93 bn	4.04 bn
Brochures distributed**	34.53 m	58.79 m
High-value customer contacts***	2.43 m	2.07 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 requests and downloads, respondents via MySwitzerland.com, STC and tour operators, and e-newsletter subscribers

Promotion.

Enticing TV and print advertisements, exclusive special offers, live campaigns and trade-fair appearances: ST uses every kind of promotion to market Switzerland in all its variety worldwide.

Autumn breaks for Switzerland.

To create the “holiday passport”, which invited guests to discover the colourful Swiss autumn with its glorious natural landscapes and wealth of living traditions, ST produced attractive offers while SBB (Swiss Federal Railways) and the Swiss Association of Public Transport came up with unbeatable prices. The off-season campaign paid off, resulting in the sale of 15,000 holiday passports and 65,000 companion tickets, and generating more than 1,600 direct bookings.



Rides in the high-speed AVE train from Madrid to Barcelona took on a captivating Swiss flavour.

Fast track through Spain.

Throughout June, the high-speed AVE train, linking Madrid and Barcelona, also connected Spain with Switzerland. Posters, brochures and advertising banners brought the Swiss summer vividly to life, Kambly, one of ST's partners, provided sweet treats – and a competition on Facebook generated tremendous interest.



Italy: Switzerland on display.

A further highlight was a collaboration with the exclusive Milan department store La Rinascente, which placed Switzerland in its spotlight for 21 days. The celebrated architect Italo Rota designed ten shop windows for the campaign. Ten ST partners enjoyed a prominent and striking presence at locations throughout the store – as well as in 100,000 brochures distributed with leading magazines. Altogether, the project succeeded in generating 800,000 contacts.

Facts and figures.

E-marketing	2012	2011	E-marketing	2012	2011
MySwitzerland.com			Partner websites	68	67
Web visits per day*	72,312**	68,809**	E-CRM partners	23	21
Web visits per year*	26.39 m**	25.12 m**	Newsletter subscribers	603,888	526,000
Languages	16	16	Newsletters sent	8.6 m	9.2 m
Hotels	2,188	1,854	Downloads of the		
Holiday apartments	25,660	24,193	14 iPhone apps	1.53 m	1.16 m
* WEMF-certified		** Including impulse programme		Social media contacts	435,547
					170,000

E-marketing.

In a connected world, digital communication plays a central role. ST continues to pioneer eye-catching innovations, from imaginative social media campaigns to creative brochure apps for iPad.

A challenge: waking Sebi and Paul.

The mountain men Sebi and Paul were back in action once again last winter. By day they worked hard to ensure that visitors would enjoy a truly relaxing winter holiday; by night they slept like marmots. To match the theme, an innovative online game ran on MySwitzerland.com. Participants had to use their imagination to try all kinds of ways of waking Sebi and Paul. If they succeeded, they entered a draw for a week's winter holiday in Switzerland. No less than 70,000 contestants were able to successfully rouse Sebi and Paul.

“With our iPad app, information goes straight into the living room and to the family dining table.”

Thomas Winkler, member of ST's executive board, Head of Portal Management & eMarketing



Interactive iPad brochures.

ST is steadily expanding its use of digital media for worldwide marketing. In 2012, for the first time, the summer brochures "Mountains and lakes.", "Top 100 experiences." and "Top 150 water experiences." appeared in a fun and inspiring format for iPad – each in at least four different languages. By doing this ST is addressing the growing demand for an individualised, digital user experience, with animated features and interactive elements offering an effective and entertaining way of exploring Switzerland. The MySwitzerland iPad app – downloadable for free at Apple's App Store – is regularly updated, with new thematic modules added according to the seasons. Word has spread: by the end of the year, the app had been installed more than 100,000 times. Digital Switzerland is proving highly popular among armchair explorers: every day, about 400 visitors browse through the iPad brochures.

Facts and figures.

Key media management	2012	2011
Media contacts	10.53 bn	8.78 bn
Media reports generated	12,776	11,391
Participants on ST media trips	1,988	2,068
TV teams	120	115
Media conferences	87	82

Key media management.

One of ST's most important roles is working with those who shape public opinion. ST helps journalists with research, promotes campaign-related travel stories and organises media conferences and trips.

Dreams came true for Indians.

“Swiss made Dreams” is the name of a campaign that ST has been running in India for two years. This year the project culminated in a competition on Facebook: ST invited entrants to send in a video containing the most original possible reasons why anyone should be invited on a dream trip to Switzerland. From more than 3,000 clips, a jury chose the six most convincing submissions. The winners and their partners enjoyed a top-quality holiday at one of six Swiss destinations, taking plenty of opportunities to explore Switzerland off the beaten tourist track. Film crews from India accompanied the winners, making a series of reports on their adventures in Switzerland. The result was a collection of captivating “Swiss made Dreams” – followed by around 320 million Indians.



From left: cameraman Mandakini Malla from NDTV Good Times with two winners, the brothers Dominic and Anto Dhanashekaran from Bangalore, India.



Sherlock Holmes lives on.

They came from Britain and the US, the Netherlands and Japan, creating a magnificent spectacle with their period costumes and carriages from the turn of last century... About 70 members of the Sherlock Holmes Society of London travelled to the Bernese Oberland to visit locations from the famous detective stories by Sir Arthur Conan Doyle, including the Giessbach Falls and other spots that particularly inspired the author. ST, as co-organiser, made use of the event and the dramatic setting to show an international media group how inspiring the Bernese Oberland remains to this day.

“We are enjoying reliving the exciting Sherlock Holmes story in Switzerland.”

Robert Robinson,
member of the Sherlock Holmes Society of London

Facts and figures.

Key account management	2012	2011
KAM-generated overnights	4.27 m	4.31 m
Tourism turnover*	CHF 1.08 bn	CHF 1.07 bn

All figures including impulse programme

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

Key account management.

Since visitors from distant markets mostly book through travel agencies, ST works intensively with leading tour operators, pushing Switzerland's presence in the brochures and running sales workshops.

Adventures and sustainability.

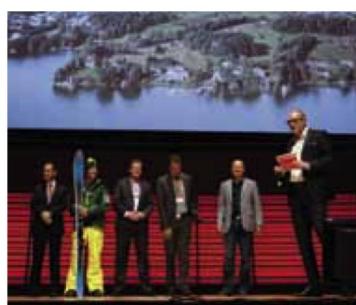
ST succeeded in bringing the Adventure Travel World Summit to Switzerland for the first time, in collaboration with Lucerne Tourism. More than 600 adventure travel experts from all over the world gathered in Lucerne to explore a variety of themes from blogging and storytelling to pricing and destination development. Switzerland, with 150 years of experience in the field, was able to present itself as a leading outdoor destination, with a proven record as a champion of sustainability.



Launch of the Swiss winter in full ski gear: (from left) Song Gao, presenter from Radio Beijing, Xiaobing Chen, President of CAISSA, Bin Feng, President of UTour.

Winter campaign in China.

So far, the Swiss winter has been promoted in China through image-building campaigns. Now it is offered proactively as a holiday product with skiing. To launch it, ST organised a media conference with the two leading tour operators to Europe, CAISSA and UTour in Beijing. With the expansion of the winter business, ST expects more than 200,000 overnight stays by Chinese snow sport enthusiasts in 2017 and over 400,000 in 2022.



From left: Norbert Patt, CEO of Titlis Rotair, a skier, Roger Joss, Director of Marketing at Rigi Bahnen AG, André Zimmermann, CEO of Pilatus Bahnen, Jürg Balsiger, CEO of Stanserhorn-Bahn, Jürg Schmid, CEO of Switzerland Tourism.

Personal support in Korea.

Mode Tour is the no. 2 tour operator in Korea, and its CEO is one of the country's best-known business leaders. His love for Switzerland led him to introduce it recently to Mode Tour's programme – and as a result, ST was able to secure his services for a particularly personal advertising campaign. In a series of posters and video clips, he recommended Switzerland to his fellow Koreans as the most beautiful of all summer destinations. The campaign was a great success, generating 21,735 overnights – comfortably exceeding the 20,000 target.

Facts and figures.

Impulse programme	Winter 11/12	Summer 12
Spending (confederation, partner, ST)	CHF 4.53 m	CHF 9.99 m
Marketing contacts	1.08 m	1.52 m
High-value customer contacts	742,000	655,000
Additional generated turnover	CHF 68 m	CHF 187 m
Additional generated overnights (all channels)	367,000	713,000
Participating partners	200	330
Markets targeted by impulse programme	CH, DE, FR, IT, NL, UK, RU, PL, BR, CA, GCC, IN, CN, AUS	

Impulse programme 2012.

The 2012 impulse programme saw ST, the industry and the federal government joining forces to cushion tourism from the negative effects of the strong franc.

The additional funds awarded by the Parliament in June 2011 of 12 million Swiss francs each for 2011 (summer 11, winter 11/12) and 2012 (summer 12, winter 12/13) were primarily invested by ST in strategic growth markets, European near markets and in the domestic market. Altogether, the spending generated more than 1 million additional overnight stays per year through a variety of marketing techniques. In Switzerland, for example, ST placed emphasis on the promotion of special attractions and corresponding offers; in growth markets such as China, India and Brazil, it focused on key account management.

Switzerland.



Summer magazine with Coop.

Collaboration with Coop led to the summer magazine "Typically Swiss Hotels.". 102 suggestions for hotels and excursions offered inspiring reading – and generated 10,000 additional overnights. Coop distributed more than three million copies via its main communication channels, as a supplement in the Coop newspaper and through its branches.

China.

Stimulating Switzerland.

Together with 22 Chinese tour operators, ST launched the "Switzerland Product Boost" incorporating joint promotional campaigns. Tour operators also benefited from a simplified visa application process, made possible through ST's close collaboration with the Swiss authorities. As a result of the drive, ST could reach an increase in overnights of 15 %.

“In the last two years the number of visa applications has grown 10 % year-on-year.”

Chen Xiaobing,
president of CAISSA Touristic