

Zeitschrift: Annual Report / Switzerland Tourism
Herausgeber: Switzerland Tourism
Band: - (2014)

Rubrik: Focus

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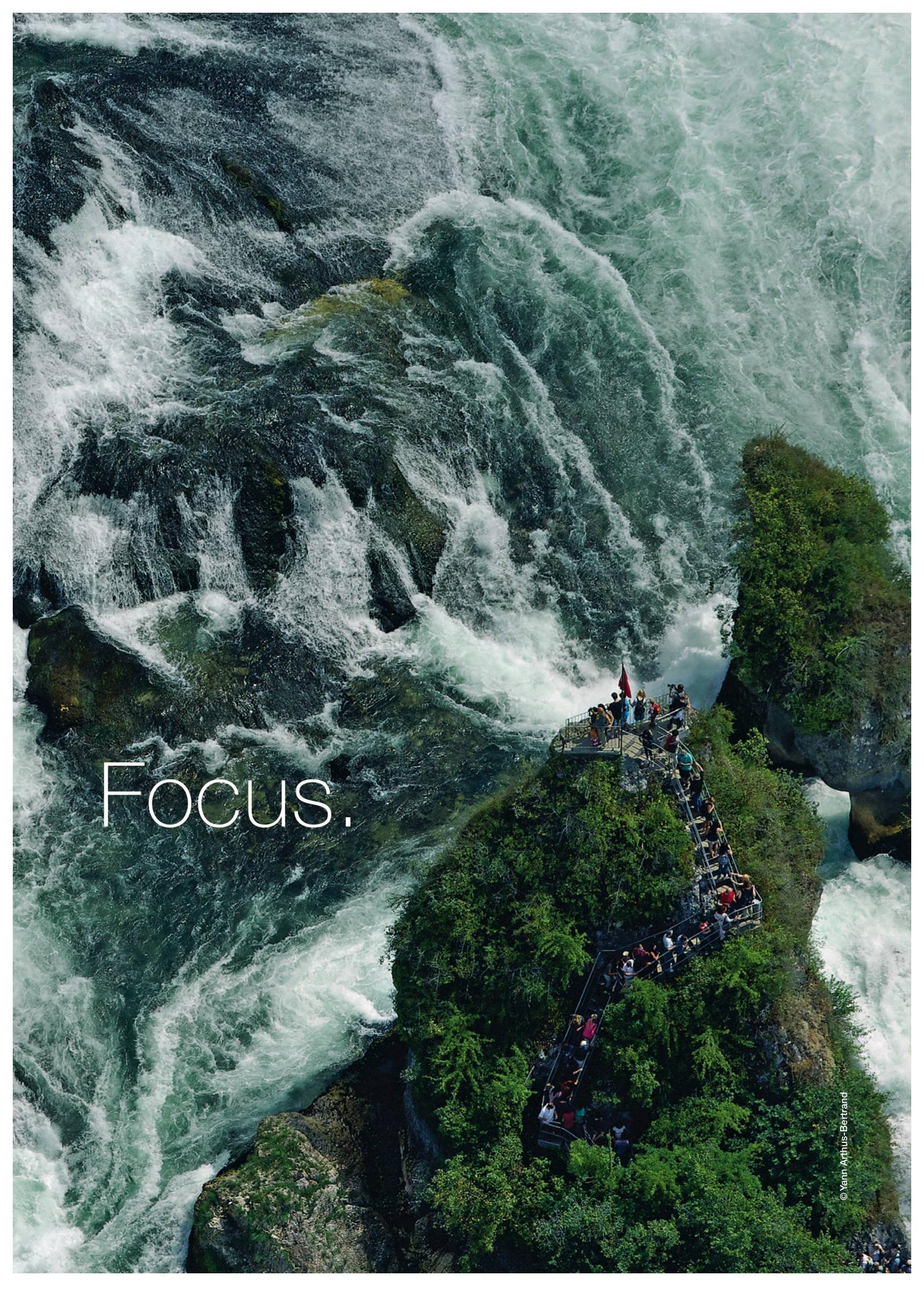
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An aerial photograph of a powerful waterfall cascading over dark, mossy rocks. The water is a vibrant turquoise color, churning into white foam as it falls. On the right side, a metal viewing platform and a set of stairs lead down a lush green cliffside. A group of people is gathered on the platform, looking at the waterfall. One person is holding a red flag. The overall scene is dramatic and scenic.

Focus.

The guest's opinion as the basis of all marketing.

ST tapped into valuable market intelligence with the Tourism Monitor Switzerland (TMS), the country's largest visitor survey. In the 2013 tourist year, ST surveyed 13,924 overnight tourists from the leisure sector, representing over 100 source markets in 180 Swiss tourist destinations.

The TMS investigates the preferences and behaviours of tourists, tapping into market intelligence. It provides the basis for decision-making in the strategic and operative marketing of ST – including the positioning and differentiation of Switzerland as a tourist destination by means of its image, the needs of visitors, tourist strengths and competitive advantages.

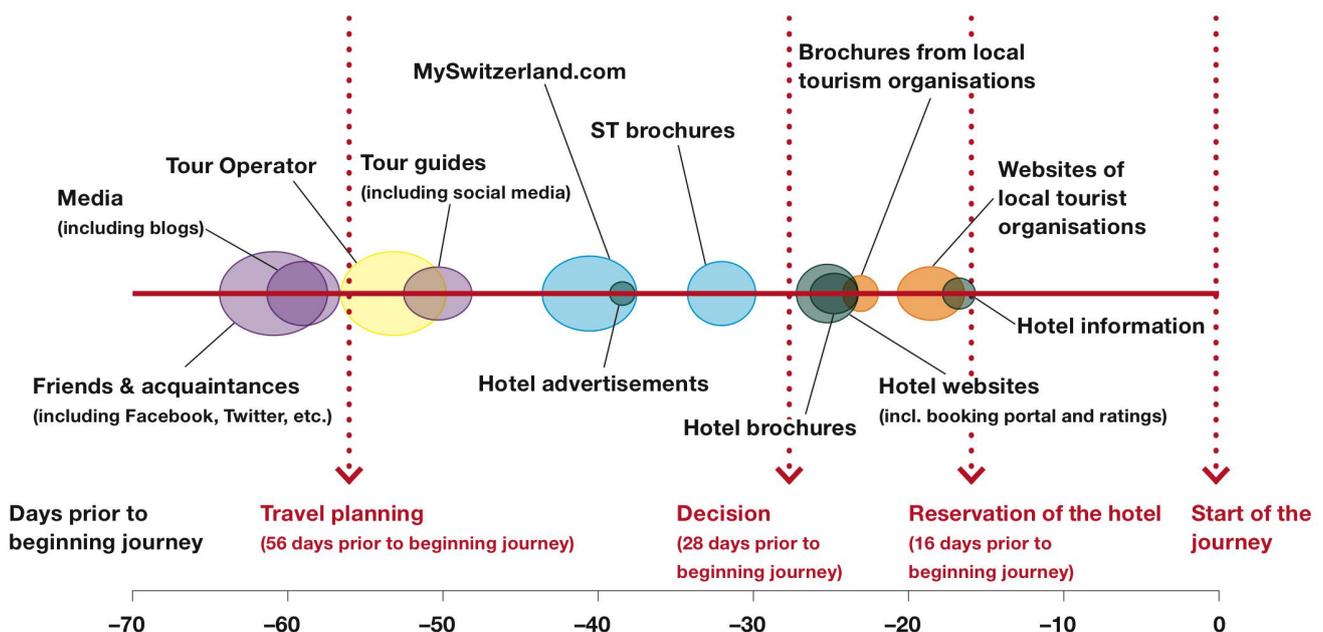
Individually produced online reports from market research data

In order to exploit this wealth of visitor feedback effectively, approximately 3.9 million individual data points were entered into an interactive online database. By means of 200 filtering, segmenting and benchmarking variables, numerous individualised analyses can be generated.

A sample analysis of the trip-planning process

As an illustrative example, a TMS analysis of the trip-planning process of European hotel guests delivered the following insights: on average, planning begins 56 days before departure and is typically inspired by neutral sources of information such as friends and acquaintances, the media and guidebooks. ST's platforms and publications are used in particular during decision-making about the trip. Up to the point of booking hotels, i.e. an average of 16 days before departure, accommodation and the local tourism organisation are key communication channels.

This is how European hotel guests inform themselves.



Source: TMS 2013 (Summer); hotel guests from principal European markets (CH, DE, NL, BeNeLux, UK, FR, IT). The values shown are median values, i.e. 50% of guests plan, decide and/or book earlier, and 50% later.

Proven efficacy of ST's global marketing.

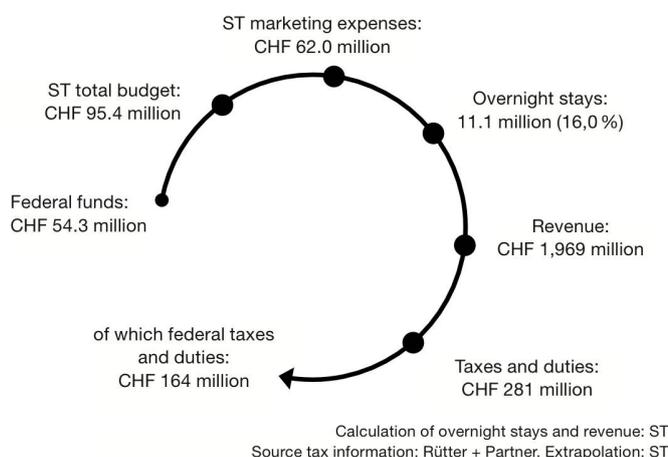
Scientifically proven and internationally recognised

In 2007, ST proved the efficacy of its global marketing by using a scientifically recognised measure¹ for the first time. According to an international assessment², this constitutes the most fully developed measurement of a national tourism organisation. ST proved its efficiency and efficacy for the third time, based on the current TMS results from 2013.

Results

ST continues to influence every sixth night in Swiss hotel and non-hotel accommodation. For the 2013 tourism year, this represented 11.1 million overnights (16%) and revenue of CHF 1.97 billion.

ST chain of effects 2013.



¹ Laesser, Christian (2007): Gutachten über das neue Wirkungsmessungskonzept von Schweiz Tourismus, inklusive einer Validierung der Beitragsanteile von Schweiz Tourismus an unterschiedlichen Kommunikationsinstrumenten.

² Laesser, Christian (2013): Evaluation der Methodik des Wirkungsmessungskonzepts von Schweiz Tourismus.

Sources only available in German.

Three questions for Christian Huser, Head of Market Research ST.



Can you briefly explain ST's efficacy measure?

Using the TMS visitor survey, tourists are asked which information sources triggered their travel decisions, and how much they spent on their holiday. It also investigates

how strongly ST is involved in each of the 28 sources polled, for example guidebooks or brochures. By connecting these three data-points mathematically, you can see the percentage of overnights influenced by ST, as well as its percentage of the revenue.

How is the validity of the results guaranteed?

The data pool is representative and the measurement model is logically consistent. The model's validity has been recognised by a scientific assessment¹, and ultimately its reliability is demonstrated

by the fact that the percentage of overnights influenced by ST only varies slightly from measure to measure.

What does a tourist service provider's optimum communication mix look like?

In general, online promotion has double the impact of paper brochures. Ultimately, however, the optimum communication mix will vary greatly according to guest origin, percentage of regular guests and of course the financial resources of the tourist service provider.

“Online promotion has double the impact of paper brochures.”

Christian Huser, Head of Market Research ST

Two questions for Jörg Peter Krebs, Director ST Germany, Central & Eastern Europe.



What are the consequences of the SNB decision?

It's meant we are directing our marketing activities even more closely at our target groups – women, as important decision-makers about holidays, and Best Agers – while turning away from generic image advertising. Emotive pictures, strong stories and good offers are our top marketing priorities.

What are the chances of convincing Germans to holiday in Switzerland now?

The fact is we are going to have to fight more and more for every single visitor – which is exactly why in the future only a focused, coordinated and united approach with our partners will create chances to retain regular German visitors and gain new ones.

“A coordinated approach with our partners is crucial.”

Jörg Peter Krebs, Director ST Germany, Central & Eastern Europe

Focus market Germany.

As Switzerland's largest foreign source market, Germany deserves particular attention following the removal of the euro currency peg by the Swiss National Bank at the start of 2015. German guests are particularly price-sensitive, and were hit hard by recent currency developments.

The sensitivity of German visitors to prices remained high in 2014, with many of them spending their holidays at home. The development of hotel overnights in Switzerland remained below expectations at -3.9%. An even stronger franc has made the situation still more critical. In October, ST launched a comprehensive two-year campaign entitled “Grüezi Deutschland”. ST also intends to catch Germany's attention with consolidated media work and seasonal promotions.

Facts and figures.

Germany

Overnights 2014	m	4,39
Change compared with 2013	%	-3,9
Media reports generated		2 494
Visits to MySwitzerland.com	m	1,79
Advertising & marketing contacts	m	381,79
High-value customer contacts		563 298

“Grüezi Deutschland”: the Berlin launch.

In October, a VIP event at the Swiss embassy in Berlin marked the launch of the comprehensive “Grüezi Deutschland” campaign. Seven sub-projects had originally been planned, but in view of the critical situation caused by the strength of the franc, all activities have been re-evaluated and adjusted. The focus is on tapping into central sales channels and positioning Switzerland as a premium destination.



Honorary guest Denise Biellmann and Jörg Peter Krebs, Director ST Germany, Central & Eastern Europe, in front of the Swiss Embassy in Berlin.

Two questions for Jean Kim,
Market Manager ST Korea.



Why are more and more Koreans travelling independently?

Current offerings in the group travel sector don't really meet the needs of Korean visitors and their growing demand for independent trips. Inspired by new channels of information such as reality shows, more and more Koreans are visiting as independent tourists in order to explore Switzerland in the footsteps of TV stars.

Which products can ST utilise to enthuse Koreans about Switzerland?

Korean visitors want exceptional experiences on their trips – and to be able to share them with their families and friends via social media. They value insider tips, which let them discover things on their own.

“More and more Koreans are travelling as individual tourists.”

Jean Kim, Market Manager ST Korea



Heidi feeling: entertainer Noh Hongchul in Engelberg.

Focus market South Korea.

Record visitor numbers from Korea. This market achieved the highest growth rate – not least due to creative marketing ideas.

With growth of 40%, South Korea passed the mark of 250,000 hotel overnights for the first time, demonstrating the greatest growth proportionally. This is due, in part, to creative marketing techniques. In recent years ST has secured prominent Koreans to act as ambassadors, reporting first-hand from Switzerland on social media. ST has also often successfully collaborated with Korean reality shows. More and more fully independent travellers (FITs) are visiting from Korea and showing great interest in gastronomy, outdoor activities and shopping. The increase in FITs from Korea led to a sales record at Swiss Travel System, and a 125% increase in tickets sold.

Facts and figures.

Korea

Overnights 2014	m	0,26
Change compared with 2013	%	40
Media reports generated		671
Visits to MySwitzerland.com		196 416
Advertising & marketing contacts	m	418,74
High-value customer contacts		56 220

Star Korean entertainer in Zermatt.

Famous, desirable and single: for the Korean TV show “I Live Alone”, celebrities offer a view into their private lives. ST Korea recruited one of the participants, the entertainer Noh Hongchul, to be an ambassador. His crew filmed him undertaking outdoor activities and visiting the “in” places in Zermatt, Lucerne and on the Titlis. After the show, which delivered a 9 % audience share, significantly more Koreans made reservations at local paragliding firms and at numerous hotels in Zermatt and Lucerne.

Award-winning work.



ST was once again crowned Tourism Marketing Organisation of the year, taking home the prestigious Virtuoso award: Becky Powell, Virtuoso; Alex Herrmann, ST Americas; Matthew D. Upchurch and Albert Herrera, Virtuoso.

Glittering honours in Switzerland

In Switzerland, ST won silver and bronze “Best of Swiss App” awards for their apps “Best Swiss Hotels” and “City Guide”. The ADC Switzerland, the association of the leading creative talents in communications, honoured ST’s “Sebi & Paul” TV ads with an “Evergreen”, a prestigious award for campaigns which run for at least three years.

More awards from around the world

The ST online campaign “Winter Sleep” was recognised in the UK as “Travel Marketer of the Year”. At World Travel Market in London, ST won a prize for the best fair stand in the category “Best Stand for Doing Business”. The European Travel Commission crowned the ST video “Time” the best European tourist film, and China’s golfers named Switzerland the “Best of Europe Destination”.

Gold for Switzerland:

ST wins important prizes in the US

ST was honoured in North America with prestigious awards this year too. The online project “Swiss Myths” was a marked success: it won four Communicator and Telly awards – gold in the “Branded Content” category, Silver for the online video, and bronze twice, in the categories of “Humour” and “Travel/Tourism Online”. Matching last year’s success, ST took home the prestigious award “Tourism Board of the Year”, conferred in Las Vegas by Virtuoso, the largest American luxury travel network.



Marcelline Kuonen and Mathias Gallo from ST UK accepting the Gold Award for “Travel Marketer of the Year”.



Outlook.



The Grand Tour of Switzerland connects over 1,600 km of the country's tourist highpoints: visitors can now "book" Switzerland, with all its contrasts.

"Trusted content" has become key to tourism.

Tourism marketing has to find new approaches, with digital communication platforms threatening the role of the traditional media. ST is closely observing and accompanying this development. On-line communication offers new channels of distribution which would have been fantasy five years ago, but are now commonplace. The visitor is now also a supplier of content, and that means more information and more options. ST and the industry therefore have to supply high-quality material as "trusted content", and assert themselves as reliable sources of inspiration. Because of the franc, Switzerland will remain expensive and cannot appeal to a wide audience. We need to tap into and secure new sectors and niches. Social media are perfect for this.

Launching the Grand Tour of Switzerland.

In 2015 the Grand Tour of Switzerland, a route which brings all the country's tourist high points together, was born. All of our tourist regions have displayed real commitment and unity in backing this genuinely innovative project, which reveals the destination of Switzerland in all its glory and diversity. Visitors can now "book" Switzerland, with all its contrasts. ST has embarked on extensive marketing, from uniform signage and branding through to global communication across all channels.

"Social media is the ideal way for us to appeal to new niches."

Thomas Winkler, Head Portal Management & E-marketing



A bridge in the picturesque Verzasca Valley:
Ponte dei Salti in Lavertezzo, Ticino.