

Marketing organisation

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Marketing organisation.

1. Priority markets

74.7 % of overnights in the Swiss hotel sector

France, Germany, Italy, the Netherlands, Switzerland, USA, UK (with Ireland)

2. Active markets

10.8 % of overnights in the Swiss hotel sector

Australia (with New Zealand and Oceania), Austria (with Hungary), Belgium (with Luxembourg), Canada, Czech Republic, Japan, South Korea, the Nordic countries (Denmark, Finland, Norway, Sweden), Southeast Asia (Indonesia, Malaysia, Singapore, Thailand), Spain

Switzerland Tourism in brief.

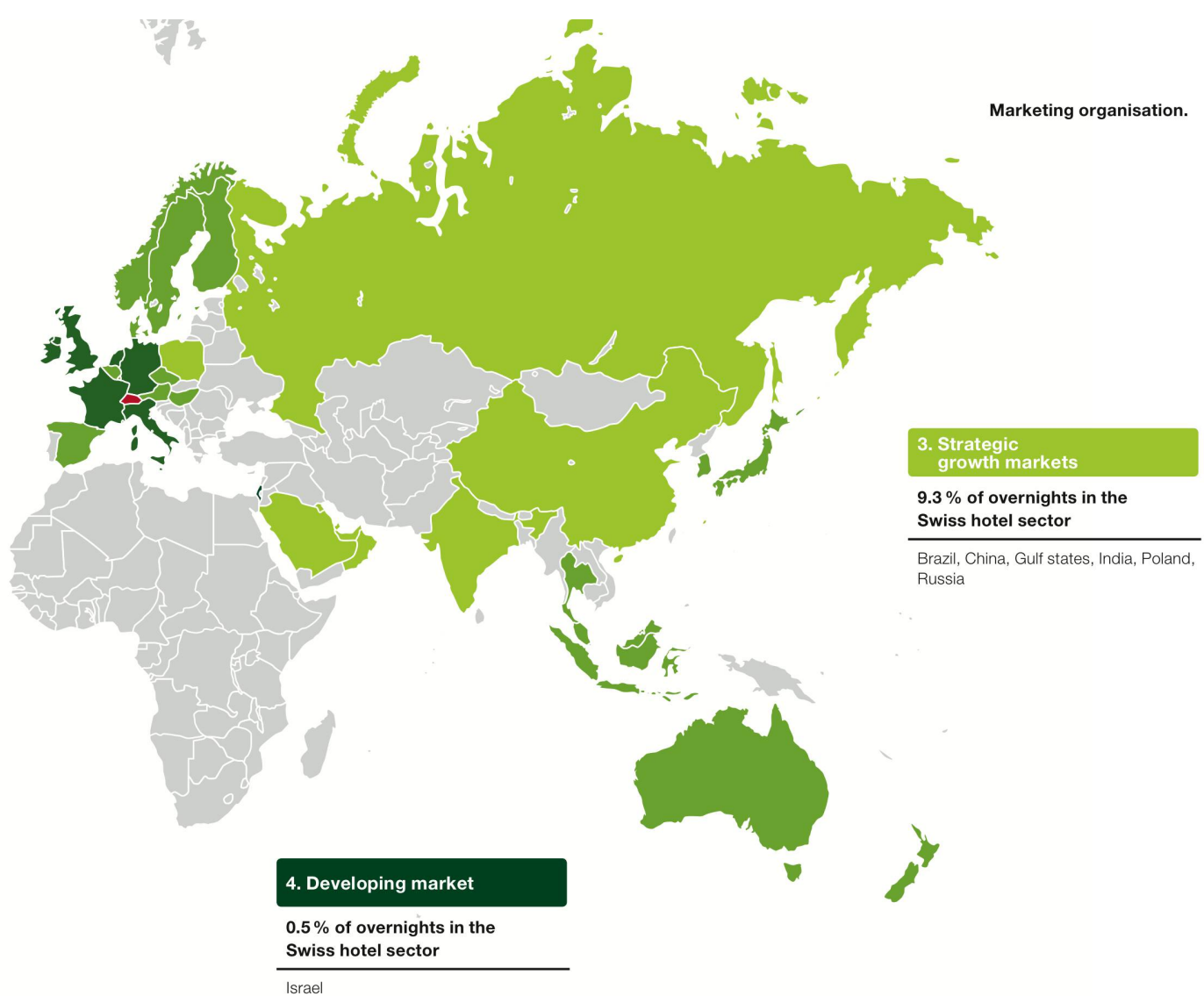
Switzerland Tourism promotes Switzerland worldwide as a holiday destination, under its slogan “Switzerland. get natural.” – alongside a clearly defined contemporary concept of Swissness.

The Switzerland Tourism (ST) marketing organisation has a long history. It has been promoting Switzerland as a holiday, travel and conference destination at home and abroad for almost 100 years, by federal mandate. ST positions Switzerland as a tourism brand standing for quality, naturalness, authenticity, sustainability and modernity, under the overall concept of “Swissness”. To do so, ST 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,

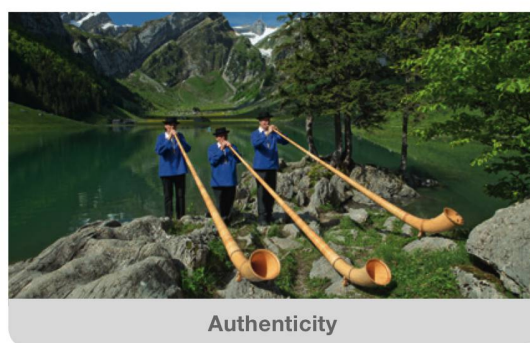
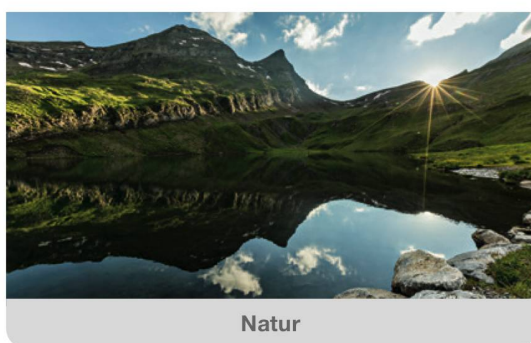
business and industry associations. ST’s president is Jean-François Roth, while Jürg Schmid is responsible for operational management. Headquartered in Zurich, ST is present in 27 countries, employing 245 staff.

Facts and figures.

Regional representations		27
Staff		245
– of whom trainees		22
Spending	CHF m	94.96
– of which regular federal funding	CHF m	52.83
Spending abroad	CHF m	71.86
Degree of self-financing	%	43.91
Marketing budget/ marketing staff	CHF	298,000



Positioning of the holiday destination Switzerland.



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." – a promise, as well as an invitation. In this way Switzerland sets itself apart from the competition, emphasising above all the experience it offers.

Hotel
overnights.

	Overnights 2014	Overnights 2013	Change 2014/2013	in %	Overnights 2005*	Change 2014/2005*	in %
Priority markets							
Switzerland	16 026 135	15 889 226	136 909	0,9	14 622 420	1 403 715	9,6
Germany	4 394 457	4 573 496	-179 039	-3,9	5 563 695	-1 169 238	-21,0
UK (with Ireland)	1 736 723	1 708 918	27 805	1,6	2 088 879	-352 156	-16,9
USA	1 644 424	1 585 467	58 957	3,7	1 494 210	150 214	10,1
France	1 337 882	1 350 164	-12 282	-0,9	1 225 619	112 263	9,2
Italy	1 014 058	980 646	33 412	3,4	1 011 279	2 779	0,3
The Netherlands	681 671	709 937	-28 266	-4,0	828 889	-147 218	-17,8
Active markets							
Belgium (with Luxembourg)	730 555	747 845	-17 290	-2,3	890 733	-160 178	-18,0
The Nordic countries (Denmark, Finland, Norway, Sweden)	497 544	498 934	-1 390	-0,3	420 663	76 881	18,3
Austria (with Hungary)	472 758	491 069	-18 311	-3,7	388 177	84 581	21,8
Japan	439 894	491 651	-51 757	-10,5	584 923	-145 029	-24,8
Spain	417 114	427 310	-10 196	-2,4	348 245	68 869	19,8
Southeast Asia (Indonesia, Malaysia, Singapore, Thailand)	412 509	420 742	-8 233	-2,0	180 144	232 365	129,0
Australia (with New Zealand and Oceania)	314 810	308 479	6 331	2,1	194 959	119 851	61,5
South Korea	263 189	187 966	75 223	40,0	135 610	127 579	94,1
Canada	230 848	230 189	659	0,3	178 202	52 646	29,5
Czech Republic	113 975	111 569	2 406	2,2	63 346	50 629	79,9
Strategic growth markets							
China	1 142 438	994 546	147 892	14,9	219 836	922 602	419,7
Gulf states	770 725	623 205	147 520	23,7	252 181	518 544	205,6
Russia	532 775	578 656	-45 881	-7,9	276 322	256 453	92,8
India	485 216	467 967	17 249	3,7	249 070	236 146	94,8
Brazil	222 211	206 378	15 833	7,7	102 677	119 534	116,4
Poland	174 652	166 400	8 252	5,0	77 484	97 168	125,4
Developing market							
Israel	164 119	160 575	3 544	2,2	154 030	10 089	6,6

*There is no data available for 2004, so 2005 is used for comparison instead
 Overnights at Swiss hotels and spas (by selected countries of origin, partially aggregated)
 Source: HESTA, Federal Statistical Office 2014, 2013 and 2005

The Swiss hotel sector asserts itself.

In 2014 the Swiss hotel sector recorded 35.9 million overnights, which represents a slight positive change (+0.9 %) compared to the previous year. This is a pleasing result overall in light of losses caused by the heavy summer rains in June and July. The slight increase is principally thanks to the strategic growth markets, which achieved an above-average result of 9.6 % growth (Gulf states +24 %,

China +15 %). The most important market, Switzerland reached a record 16 million overnight stays (+0.9 %), while European markets recorded a slight decrease (-2.2 %). The number of overnights remained at the level of the previous year in non-urban regions (countryside -0 %; mountains -0.2 %), while Swiss cities recorded growth of 2.1 %.

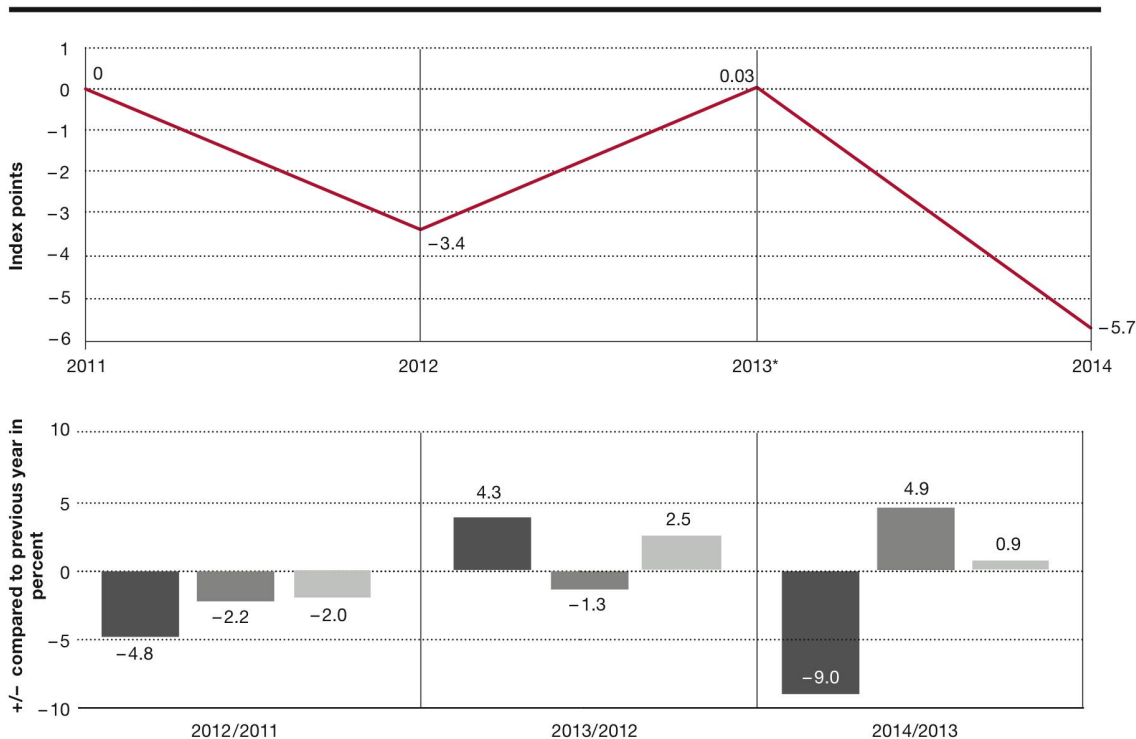
Overall development: the weather puts a damper on the balance sheet.

Beside hotels, key elements of the Swiss tourism industry include non-hotel accommodation and day and excursion tourism. For three years now, ST has been analyzing the overall development of the industry through its "Tourism Development Index" (TDI) measure. This annually published indicator demonstrates how tourist frequencies (e.g. overnights revenue, visitors, passengers and entries) have developed in the various sectors of the industry.

Across Switzerland the numbers of tourist frequencies fell in the 2014 calendar year, with the index showing a decline of 5.7 points. The previous year's positive development could not be sustained, partly because of only modest impetus for growth in the

hotel industry (+0.9%), owing to continuing tense economic conditions across Europe. In addition very poor weather at the start of the winter season 14/15 and substantial rainfall in the summer months meant difficult conditions for day-trip and excursion tourism, which declined by 9% compared to the previous year. On the other hand, the results in non-hotel accommodation were positive (+4.9%). For example, both the providers of holiday apartments (+6.8%) and Swiss youth hostels (+0.4%) were able to increase the number of overnight stays, while camping grounds suffered a decline (-5%).

Tourism Development Index (TDI).



*"Züri-Fäscht" 2013 not included in the base case (total effect with 2.3 million additional visitors: +3.7 points).

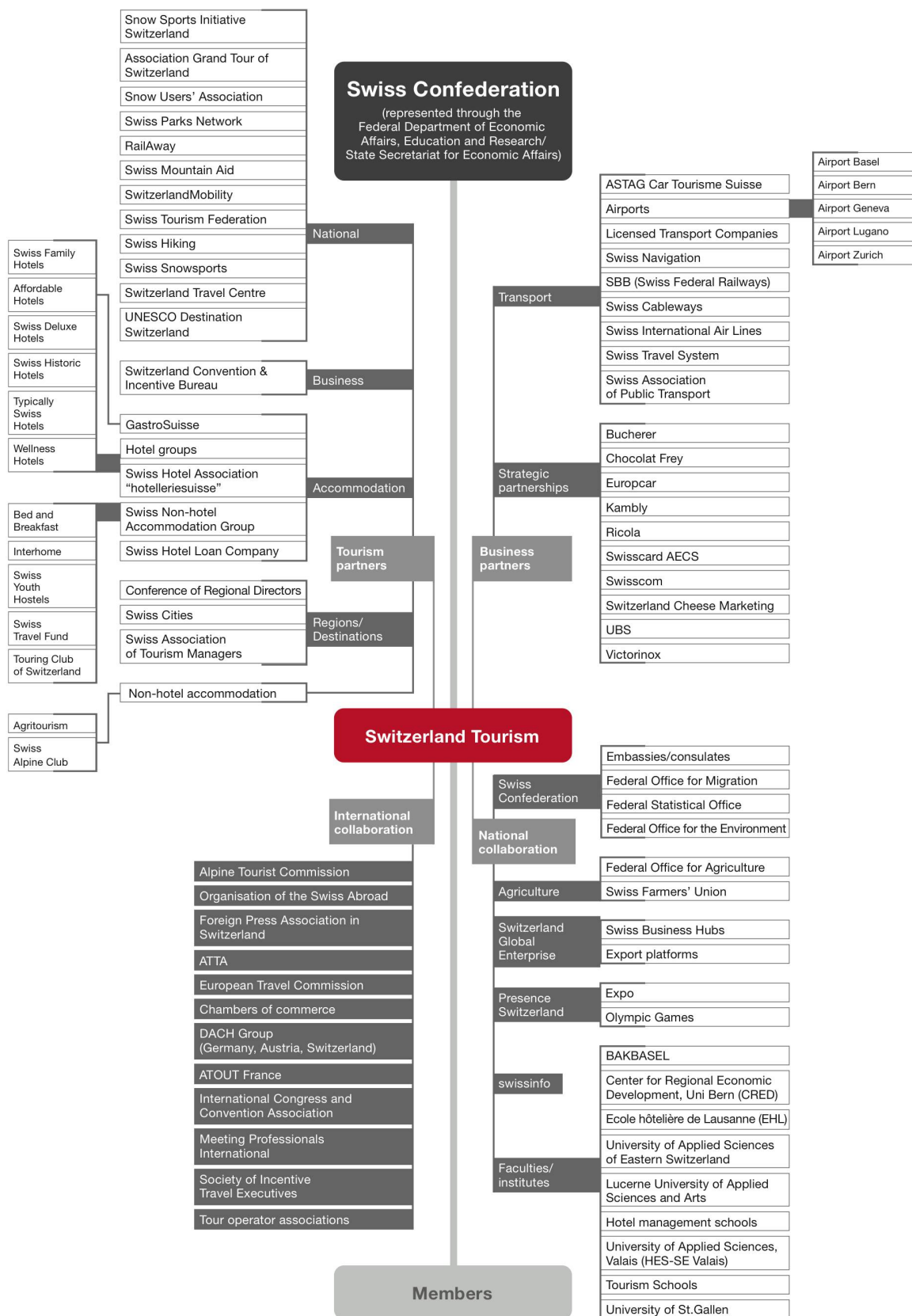
Sources: hotel sector (HESTA, BfS); non-hotel accommodation (HESTA, BfS & ST); day trips (ST).

Preliminary final results, subject to change.

■ Tourism Development Index
 ■ Day trips
 ■ Non-hotel accommodation
 ■ Hotel sector

The ST network, basis for success.

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



Members enjoy significant advantages.

Access to strategically vital knowledge, a close network and ST marketing: these are the advantages of ST membership.

ST members are always up-to-date: they enjoy exclusive access to STnet.ch, ST's B2B online portal dedicated to tourism. This is the industry's largest information platform – and since its redesign at the end of 2014, it is now faster and more user-friendly. Through STnet.ch, members can view the ST business plan, medium-term planning, selected current studies and analyses, as well as the comprehensive representative visitor survey Tourism Monitor Switzerland (TMS). Membership in Switzerland Tourism forms the basis for extended cooperative opportunities. Members profit from an international network of tour operators, business partners and opinion-makers. Annual membership costs CHF 1,810.



For many, the most important networking platform: Switzerland Vacation Day in Lausanne.

Facts and figures.

Collaborations within the tourism sector	2014	2013
Participating partners*	984	993
Members**	702	695
Marketing income from partners	CHF m26,28	27,22

* Including collaborations with hotels and Switzerland Travel Mart

** Current members are listed at www.stnet.ch/mitglieder



Vacation Day: "sightfeeling" instead of sightseeing.

Emotional marketing in the age of technology: "sightfeeling" instead of sightseeing. More than 1,400 participants discussed significant trends at the 17th Switzerland Vacation Day. ST presented new insights and best practice at the most important event in Swiss tourism. Prestigious speakers addressed the event, including Rolf Soiron, president of the board of directors at Lonza (and, until 2014, Holcim) and designer and editor-in-chief of the lifestyle magazine "Monocle", Tyler Brülé.



Left: Switzerland Vacation Day at the SwissTech Convention Centre in Lausanne.

Right: engagement at Hotel Marketing Day – Christian Brawand, Nils Kuypers, Christoph Schmidt, Karl Isler and host Katja Stauber.

Hotel Marketing Day: social media and pricing.

In addition to the established event in German-speaking Switzerland, ST also held a Hotel Marketing Day especially for the French-speaking part of Switzerland. A total of 460 hoteliers tackled issues of smart pricing, efficient content marketing and storytelling. The engaged podium discussions and lively votes from the public showed that social media is much more than just a trend with hoteliers: it is actively utilised.

Industry partnerships.

For the industry, ST serves as the key information hub and centre of expertise for global marketing. The tourism regions are the central partners in cooperation and coordination. In 2014, 13 regional partners invested 10.85 million francs in joint marketing activities with ST.



The region of Bern gets mobile: the bar on the TGV.

Bern:

get in the mood with TGV Lyria.

The Swiss-French train company TGV Lyria connects Paris to Switzerland. Together with ST, they made travellers aware of the summer vacation opportunities in Bern. TGV Lyria launched an online competition, displayed 216 posters, decorated the bar of a TGV train with atmospheric pictures of Bern and distributed 20,000 flyers. The campaign generated 1.4 million marketing contacts.

Facts and figures.

Industry partnerships		2014	2013
Regional partners		13	13
Investment by regional partners	CHF m	10,85	10,73
Investment by industry as a whole	CHF m	26,28	27,22



A Nordic trend in Switzerland: SwimRun World Championship.

Graubünden:

a sporting spectacular over 52 km.

Switzerland attracted particular attention in the Nordic countries thanks to the Scandinavian sporting trend SwimRun, a 52-km combination of running and swimming. ST helped the Swedish organisers Ötillö to stage the SwimRun World Championship in the regions of Engadin St. Moritz and Bregaglia – the first time it had been held outside Sweden. The result was 1,400 additional overnights in Silvaplana and around 160,000 social media contacts and TV viewers.



Running in central Switzerland:
ADAC.

Lucerne-Lake Lucerne Region: exclusively in the ADAC travel magazine.

In cooperation with ST, the ADAC (General German Automobile Association) showcased the Lucerne-Lake Lucerne Region in a 164-page special edition of its travel magazine, reaching 1.7 million readers. ST was supported in this media collaboration by the Lucerne-Lake Lucerne Region, public transport and Victorinox.

Business partnerships.

The joint marketing activities of ST and its partners were characterised by quality and Swissness. They lead to win-win results for all involved.

ST's strategic and official partners gain attractive platforms for the global marketing of their products. They also benefit from ST's strong market presence. In return, they support ST financially and with products and services. Everyone wins from the vibrant Swissness – as well as quality and performance – of each individual partner. The resultant synergies open up new markets and channels of communication. Through targeted campaigns, collaboration can lead to an above-average media

impact, even in existing markets. Marketing activities in 2014 were a success for both ST and its partners. Sponsoring income amounted to CHF 9.67 million in 2014.

Facts and figures.

Business partnerships	2014	2013	
Strategic Premium Partners	6	4	
Strategic Partners	10	10	
Official Partners	17	18	
Special Partners	3	2	
Revenue from sponsorship	CHF m	9,67	9,04



UBS:

jubilee winter brochure.

The brochure "150 years of Swiss winter holidays", which ST produced in conjunction with UBS for the Swiss market, provided inspiration for nostalgic winter experiences, presenting 150 tips covering every Swiss region. 255,000 copies in four languages were distributed.



Daniela Bär, Head of ST Communications, and Marcel Bühler, CEO American Express Switzerland.

American Express:

the PRIX BIENVENU for hospitality.

The PRIX BIENVENU, which ST awards annually, recognises hospitality and above-average service in hotels. As the presenting partner, American Express gave the winning hotels the credit card commissions of up to CHF 10,000 until the end of the year. Read more on page 18.



Mammut:

exclusive winter collection.

For more than 150 years Mammut has been producing innovative alpine sports equipment in top Swiss quality. In collaboration with ST, Mammut developed an exclusive clothing line for men and women for the 150th anniversary of winter tourism in Switzerland.

A modular approach to tourism marketing.

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

Through the Swiss Confederation's basic mandate, all tourism service providers benefit from ST's numerous marketing activities. These include a global

market and media presence through ST's representations in 27 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 high quality standards.

	Promotion	E-marketing	KMM	KAM	General
Market key partners	<ul style="list-style-type: none"> Regional/destination brochures Flyers/inserts, etc. Advertisements Events Trade fairs 	<ul style="list-style-type: none"> Presence on third-party platforms MyS.com: landing pages/banners Additional topics ST E-newsletter Social media campaigns (specified) 	<ul style="list-style-type: none"> Media events in market Media excursions to partner Press releases 	<ul style="list-style-type: none"> Sales calls Workshops Switzerland Travel Experiences Study trips to partner 	<ul style="list-style-type: none"> Account manager Individual partner reporting
Campaign	<ul style="list-style-type: none"> Digital brochures High frequency incl. distribution 	<ul style="list-style-type: none"> Skyscraper, teaser 1x topic in ST E-newsletter Guaranteed social media presence (not specified) Flood of offers Additional access to MyS.com Campaign apps 	<ul style="list-style-type: none"> Participation at international media events and post conventions Presence at media conferences CH and main markets Press releases 		<ul style="list-style-type: none"> Detailed campaign reporting Basic integration of all campaign partners in market activities Meetings (markets, key partner day)
Additional presence	<ul style="list-style-type: none"> Additional brochures Additional promotions Live events 			<ul style="list-style-type: none"> Workshops Switzerland Travel Experiences Switzerland Travel Mart participation 	<ul style="list-style-type: none"> ST hands-on Switzerland Vacation Day participation Strategic Partnerships platforms Enjoy Switzerland participation
Basic mandate	<ul style="list-style-type: none"> Advising Swiss market cultivation providers TV ads Switzerland magazine Best of ... Travel tips Mood flyers Sponsoring marketing platforms Generic advertisements Generic banners Trade fair stand/basic presence 	<ul style="list-style-type: none"> Basic E-marketing MyS web presence Description region/destination Search engine optimisation and marketing, banner Calendar of events Activities: hiking, etc. Sights, top attractions Newsletter content cooperation Social media content Generic apps Hotel booking platform Holiday apartment platforms 	<ul style="list-style-type: none"> Advising Swiss providers Inviting and accrediting media Media customer relationship management (CRM) Distributing information to media Media conferences Media excursions International media excursions and media events Editing and distributing media stories Twitter messages PRIX BIENVENU 	<ul style="list-style-type: none"> Advising Swiss providers (incl. lists of TOs) Developing events with promoters Global accounts Study trips Switzerland Travel Mart E-learning programme Promoter customer relationship management (CRM) Snow Travel Mart Switzerland 	<ul style="list-style-type: none"> Advising and coaching providers Switzerland Vacation Day Global ST presence Contact centre Mailing centre Q-programme Enjoy Switzerland basic STnet.ch Branding incl. usage rights Content management Market research/R&D Photos/film Swiss-Image Video library Annual report, AGM Marketing to Swiss abroad

Market key figures.

	Number of staff	Media reports generated	Visits to MySwitzerland.com	High-value customer contacts*	Marketing contacts
Priority markets					
Germany	17	2 494	1 787 692	563 298	381 791 941
France	10	649	1 674 286	248 128	537 729 117
Italy	9	1 309	2 102 701	495 000	839 842 390
The Netherlands	8	456	725 620	359 883	132 721 935
Switzerland (headquarters: activities for all markets)	130	1 497	11 342 718	483 000	413 000 000
USA (with Canada)	16	794	1 927 141	394 475	140 766 319
UK (with Ireland)	11	1 403	1 129 761	300 000	274 370 961
Active markets					
Australia (with New Zealand and Oceania)	1/(2)	294	198 798	8 125	7 568 796
Belgium (with Luxembourg)	4	355	445 315	65 000	114 844 120
Japan	6	526	1 088 073	103 588	974 981 181
Canada	2	incl. with USA	incl. with USA	incl. with USA	incl. with USA
South Korea	4	671	196 416	56 220	418 735 144
The Nordic countries (Denmark, Finland, Norway, Sweden)	(2)	55	184 210	33 000	20 000 000
Austria (with Hungary)	1/(1)	390	190 069	10 837	54 216 891
Spain	3	330	689 330	140 000	45 811 266
Southeast Asia (Indonesia, Malaysia, Singapore, Thailand)	2/(4)	120	270 381	17 200	8 464 534
Czech Republic	(2)	383	145 736	78 500	22 118 198
Strategic growth markets					
Brazil	1/(2)	129	294 081	720 940	95 608 140
China	11	858	282 782	361 049	165 367 415
Gulf states	3	180	172 254	16 271	29 969 346
India	1/(4)	136	258 565	340 000	47 625 000
Poland	(2)	256	301 258	50 000	101 000 000
Russia	5	750	353 078	38 283	226 405 941
Developing market					
Israel	(1)	45	63 500	40 000	1 250 000

() Mandated staff

* Number of E-newsletter subscribers, contacts via the call centre (phone calls, emails, letters), brochure requests and downloads, travellers booking at STC/MySwitzerland.com, respondents via MySwitzerland.com, STC and tour operators, app downloads, feedback/likes on Facebook, followers on Twitter

More individual visitors from Asia.

Switzerland remains a focus for visitor groups on European tours. Gratifyingly, however, the demand for individualised experiences is also growing.

ST's marketing strategy focuses on qualitative growth, longer stays and an expansion into the less popular periods of the year. The demand for individual trips is increasing, above all in longhaul Asian

markets. China has once again significantly increased its hotel overnights, and is now the fifth-strongest foreign market.

Gulf states on the up, Eurozone declining

Visitor numbers were encouraging from the Gulf states, which is now ranked between the traditional markets of Italy and the Netherlands in terms of hotel overnights. However, this growth contrasts with a significant decline from the Eurozone, above all Germany, which is still feeling the effects of the strong franc (see page 46).

Enjoy Switzerland. ST as a companion.

Enjoy Switzerland, a division of ST, advises tourist destinations – and now also interest groups – in the development of innovative products.

With a pool of ideas, trainers, inspiration and re-search resources, the Enjoy Switzerland division supports tourist destinations and interest groups to further develop their products or realise new oppor-

tunities. The Enjoy Switzerland initiative has been running for more than a decade, during which ST experts have accompanied more than 30 destinations.

The Enjoy Switzerland team promotes the exchange of knowledge in the area of product development and makes ST's broad know-how available to its project partners. In 2014, Enjoy Switzerland advised ten partners in different phases of their projects: the Glarus region, Gstaad, Porrentruy, Appenzellerland (AR), the Obergoms region, Bergell, Thal Nature Park, Schwyz, Vevey and Uri.



Innovative indulgence: fondue hiking in Gstaad.

Attractive off-season in Gstaad

Gstaad in the Bernese Oberland underlined its authentic roots by becoming a land of fondue hikes. With the goal of breathing new life into the off-season, Enjoy Switzerland, together with Gstaad, created a new cheese experience: hiking enthusiasts could enjoy their fondue out-of-doors in an oversized cooking pot on a route created just for them. To this end, guests in some of the region's hotels could order a fondue set and carry it with them in an old-style backpack.

Porrentruy: the key to the secret

The castle and old town in the small city of Porrentruy harbour giant secrets, which have thus far remained hidden from visitors. Thanks to the new "Secret Circuit", splendid buildings and hidden courtyards can now be discovered, with an electronic key giving visitors access to Porrentruy's history. The "Secret Circuit" was developed by Porrentruy in conjunction with Enjoy Switzerland.

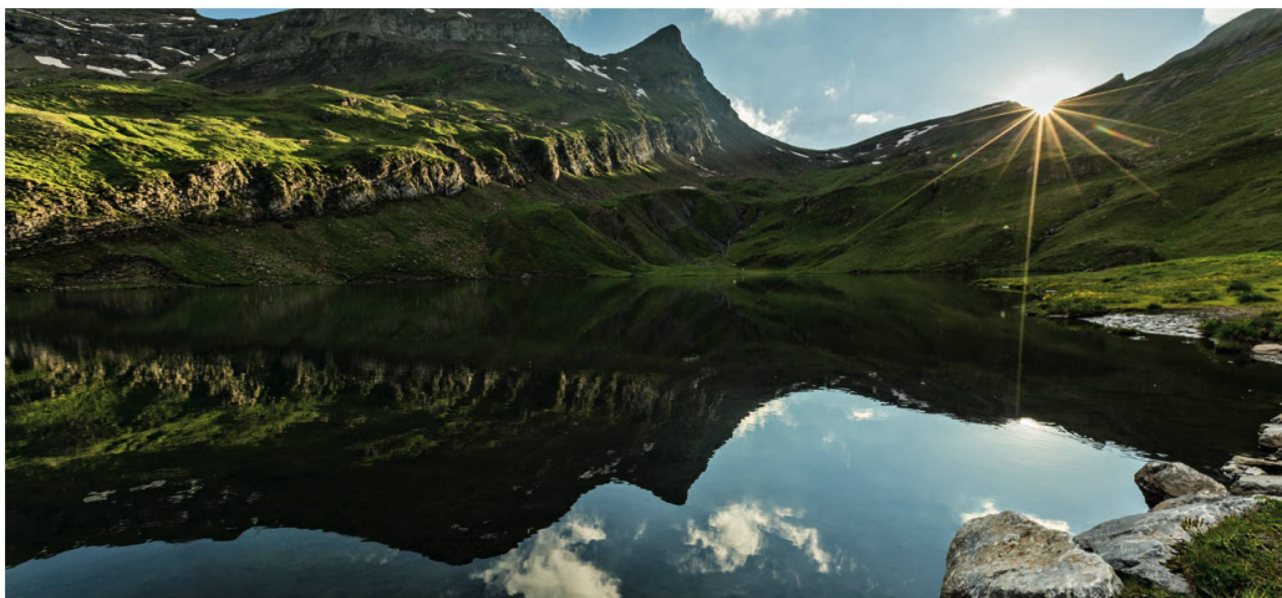
Distinguished hospitality.

PRIX BIENVENU now also for luxury city hotels

Encouraging the industry to deliver its best performance – ST, hotelleriesuisse, GastroSuisse, the Ecole hôtelière de Lausanne and the University of Bern awarded the PRIX BIENVENU for the second time to Switzerland's most hospitable hotels, at the 17th Switzerland Vacation Day in Lausanne. Coveted bronze "Bienvenu" figures were awarded in the categories of "Cosy leisure hotels", "Larger leisure hotels", "City hotels", "Luxury hotels" and "Luxury city hotels". The PRIX BIENVENU is based on online feedback from 100,000 guests and emphasises the importance of a visitor's personal impressions.



The winners of the PRIX BIENVENU: Marc Eichenberger, Grand Hotel Kronenhof, Pontresina; Stephanie Kochendörfer, Hotel Albris, Pontresina; Geraldine Dobey, Hotel Mandarin Oriental, Geneva; Chris van den Broeke, Zunfthaus zu Wirthen, Solothurn; and Thomas Stettler, Parkhotel Schoenegg, Grindelwald.



Bachalpsee, Grindelwald, Bernese Oberland

Federal Audit Office examines Switzerland Tourism.

From June to August 2014, the Swiss Federal Audit Office (FAO) audited the economics, compliance and traceability of the use of the financial resources made available to ST by the Confederation. This audit was carried out at the central headquarters in Zurich and at ST's London office. The last audit by the FAO took place in 2004.

The FAO report concluded that ST's activities are in compliance with the legal objectives and the 2012–2015 agreement with the Confederation. The report gives an overall positive evaluation of the use of the financial resources made available by the Confederation.

Recommendations for future optimisation

The FAO also made recommendations in its report for ways in which ST can improve its activities by conforming to the relevant regulations, above all in the areas of procurement and IT. ST was already implementing many of these recommendations independent of the report. Thus the FAO report noted that ST had taken immediate steps and already initiated well-structured procurement processes following the announcement of the subordi-

nation of the organisation under the Ordinance on Public Procurement (VöB) in September 2013. The recommendations in this report will help ST to attain total legal conformity.

*“The Federal Audit Office gave
ST a positive evaluation overall.”*

Jean-François Roth, President Switzerland Tourism

ST will implement the FAO recommendations within the framework of its mandate as well as budgetary and resource restrictions. This will lead to a greater significance of the appropriate balance between a focus on administration and proximity to the market, so that ST remains a lean and market-effective organisation for its nearly 700 members.

The FAO report is available at www.efk.admin.ch



One of Europe's largest inland ports:
Chevroux, Vaud.