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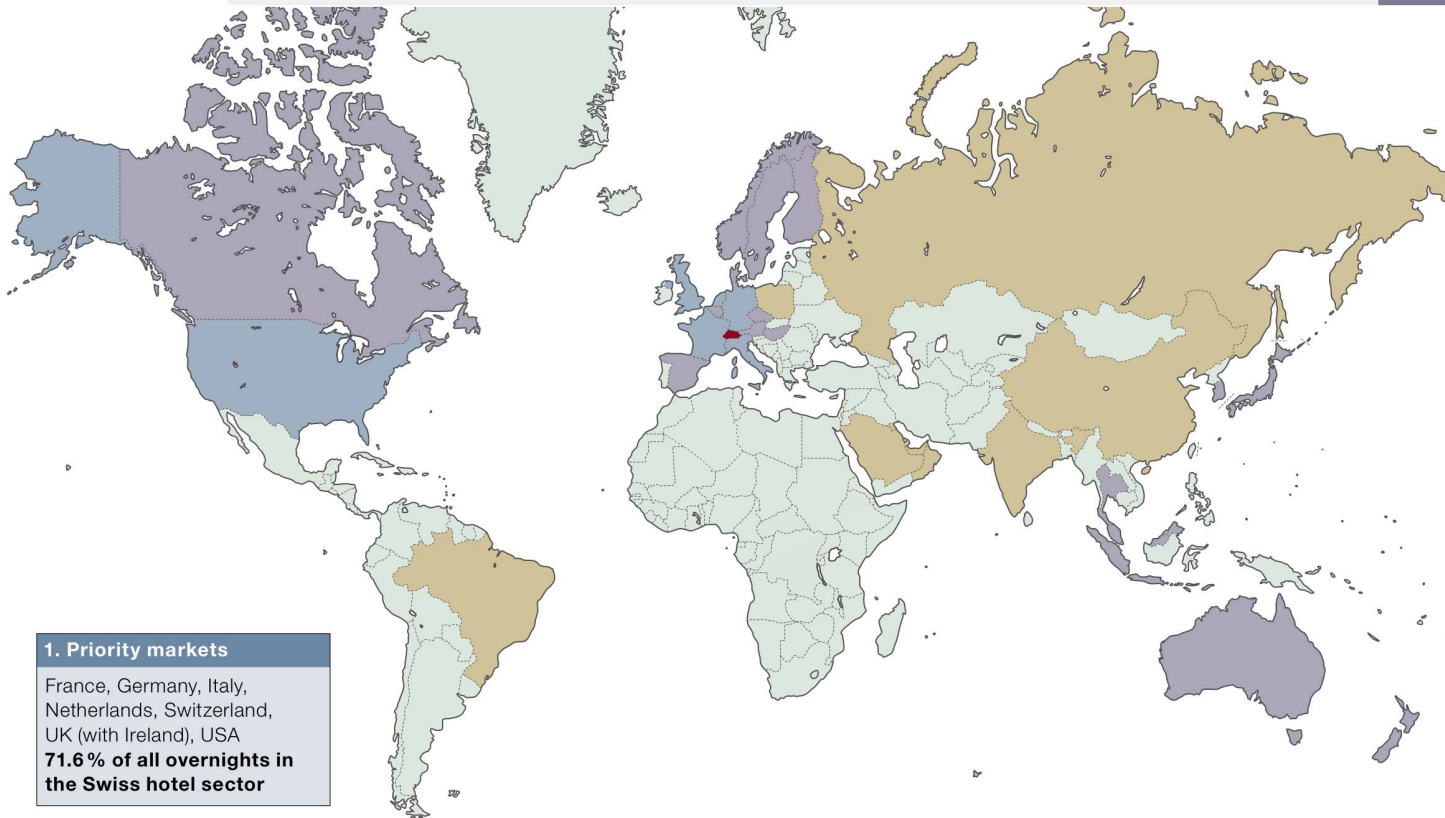
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About Switzerland Tourism.

Facts.

Presence in ... countries	27	Spending	CHF 104.05 m
Country representations	22	of which federal funding	CHF 51.44 m
Regional representations	10	Spending abroad	CHF 73.01 m
Headquarters in Switzerland	1	Degree of self-financing	43.31 %
Staff	240	Marketing budget/ marketing staff	CHF 347,500
of which trainees	23		



1. Priority markets

France, Germany, Italy, Netherlands, Switzerland, UK (with Ireland), USA
71.6% of all overnights in the Swiss hotel sector

2. Active markets

Australia (with New Zealand and Oceania), Austria (with Hungary), Belgium (with Luxembourg), Canada, Czech Republic, Japan, Korea (Rep.), Nordic countries (Denmark, Finland, Norway, Sweden), Southeast Asia (Malaysia, Singapore, Thailand), Spain
10.9% of all overnights in the Swiss hotel sector

3. Strategic growth markets

Brazil, China, Gulf states, India, Poland, Russia
7.9% of all overnights in the Swiss hotel sector

4. Developing market

Israel
0.5% of all overnights in the Swiss hotel sector

Selling Switzerland.

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

The marketing organisation Switzerland Tourism (ST) has a long history. It has been promoting Switzerland as a holiday, travel and conference destination at home and abroad for more than 90 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, and 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. Headquartered in Zürich, ST has a presence in 27 countries, employing 240 staff.



Gruyère Pays-d'Enhaut, Fribourg Region

Strategic challenge.

As a tourism product, Switzerland is in good shape. However, the strong franc continues to weaken demand in neighbouring markets.

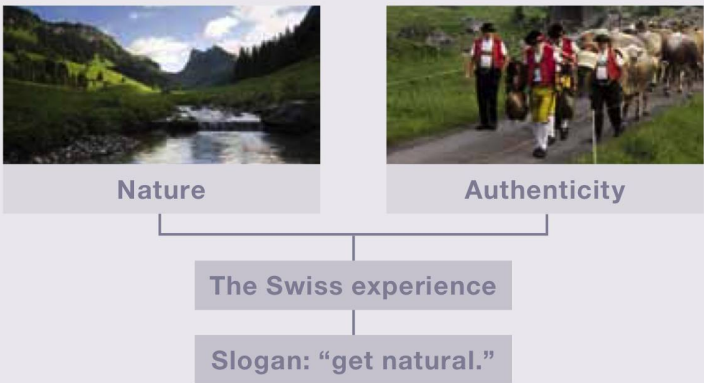
Prevailing economic conditions continue to be challenging for tourism in Switzerland. The combination of a strong Swiss currency and high production costs leads to a significant competitive weakness. The foundations for tourism growth, however, are in place, and Switzerland offers an unrivalled experience. The Country Brand Index 2012–13, drawn up by the company FutureBrand, ranks Switzerland first, on the basis of contributing factors such as high

quality of life, authenticity and pristine nature. The last two are also central to ST's positioning (see panel below). In terms of the price-performance ratio, Switzerland fell to 10th place, as expected.

Investing in growth markets

Summer is popular with visitors from growth markets, which are little affected by the strength of the franc. In 2012, they offset around a third of the fall in hotel overnights by European visitors. ST is therefore investing in markets with strong growth potential. Developing a good summer business is strategically important: the Swiss alpine hotel sector needs another good season besides winter to achieve long-term profitability.

Positioning Switzerland Tourism.



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 quality of the experiences it offers.

Distinction through quality and cooperation.

In the tourist sector, ST serves as the key information hub and centre of expertise for effective global marketing, maintaining a steady focus on quality.

ST's marketing is based on voluntary participation. Good quality and creative marketing are the keys to motivating others to take part. ST therefore strives for the highest quality in all its activities – in its coordinated use of different communication channels, in developing its products and through regular contact with the industry, its partners, the media, its staff and visitors.

Partner with a global presence

ST specialists from the fields of promotion, e-marketing, key account management, and key media management worldwide are committed to promoting

sustainable development across the entire tourism spectrum in all of Switzerland's geographical and cultural regions with ST assuming economic, social and environmental responsibility.

Joining forces through appropriate collaborations

ST works with many hundreds of official partners around the world and operates nearly 150 business plans with tour operators. ST opens up new sales channels to its partners and creates platforms for a stronger market presence, a service that particularly benefits smaller destinations and service providers who would otherwise struggle to succeed internationally. ST promotes both horizontal partnerships, e.g. with specialized hotels, and vertical partnerships: attractive offers with added value to visitors, such as a hotel package including ski lessons.

ST staff surveyed.

Switzerland Tourism received the Swiss Arbeitgeber Award 2012 – which means it numbers among Switzerland's 30 best employers.

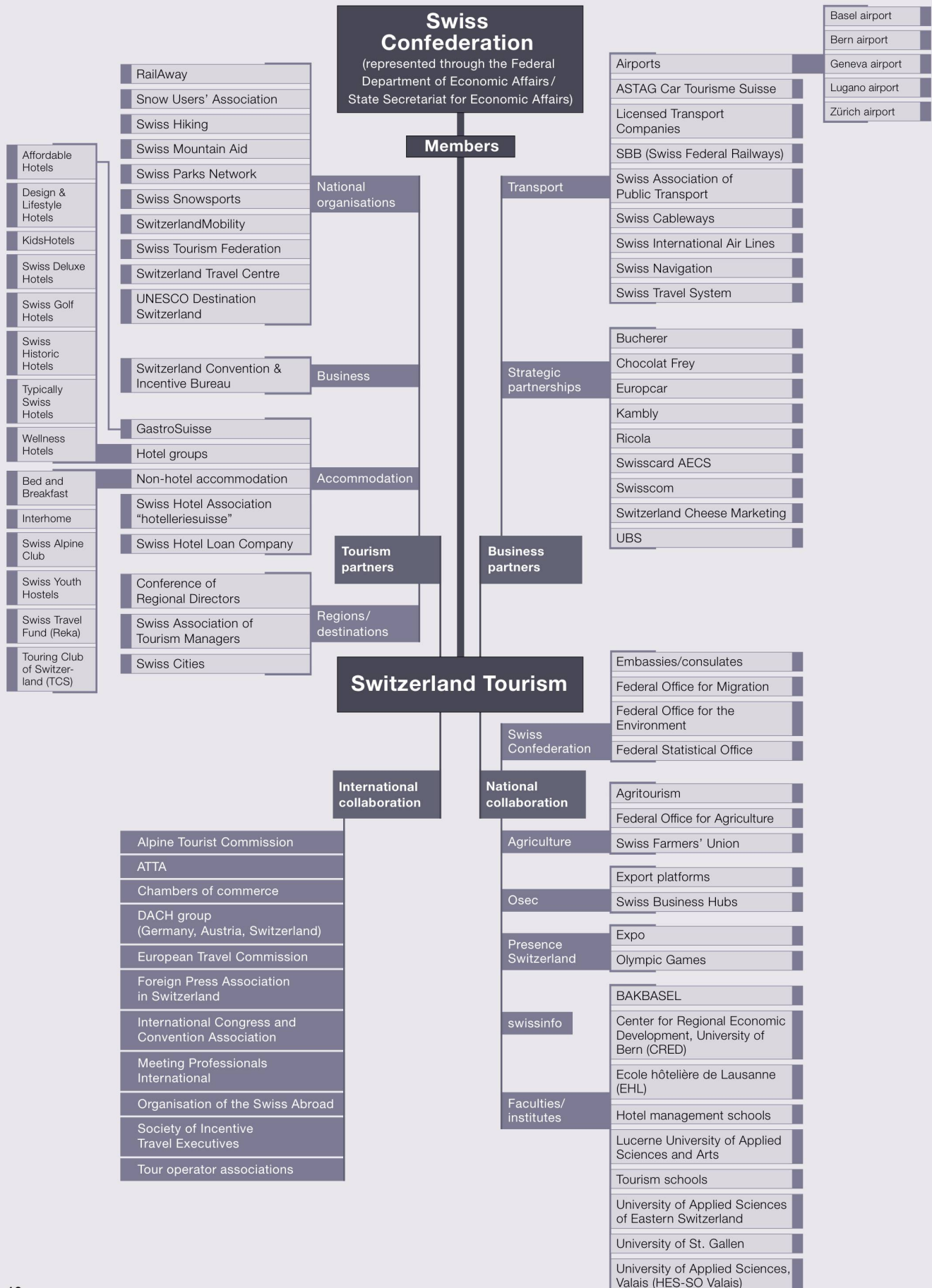
ST carried out a detailed staff survey as part of the judging process for the Swiss Arbeitgeber Award

2012. All ST staff were invited to participate and evaluate various aspects of their work. ST performed very well, coming 17th out of a total of 96 leading companies that took part. Two areas in which ST fared especially strongly were identification with the company and workplace atmosphere.



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.



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 mean a free basic marketing package, additional activities in the markets or specific services relating to distribution and monitoring, all the way up to an individual marketing strategy. In 2012, 908 partners invested 24.79 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 numerous ST core 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 a high level of quality. Specific interests in the cities sector are handled by the Swiss Cities association, which coordinates international marketing of Switzerland's cities and entrusts ST with the task of marketing them worldwide.

”Valuable synergies result from the coordinated representation of all Swiss cities.”

Marcel Perren, Director of Lucerne Tourism

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

* A+ denotes the city grouping of Basel, Bern, Geneva, Lausanne, Lugano, Lucerne and Zürich

Facts and figures.

Collaborations within the tourism sector	2012	2011
Participating partners*	908	798
Members**	696	687
Marketing income from partners	CHF 24.79 m	CHF 24.38 m

* Including collaborations with hotels

** All current partners are listed at www.stnet.ch/mitglieder

ST membership pays off.

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

The tourism-specific online library with selected studies and analyses is constantly being updated and expanded by ST market research. ST members enjoy access not only to this source of information, but also – via the partner website STnet.ch – to the business plan, medium-term planning and Tourism Monitor Switzerland (TMS)*. They may use the "Switzerland Tourism. Member." logo, are listed on MySwitzerland.com as partners, and enjoy an enhanced market presence through opportunities for collaboration and through integration in ST's media



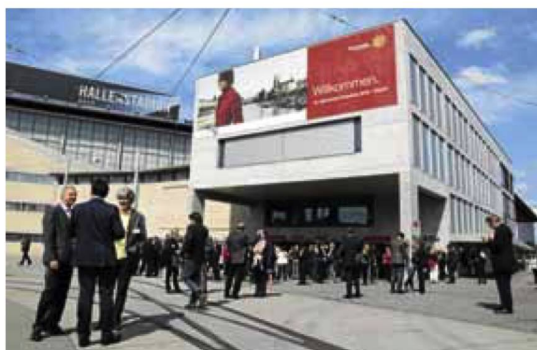
work. ST members also benefit from a network of tour operators, business partners and opinion-makers. Annual membership of ST costs 1,780 francs.

* Results of a comprehensive visitor survey



15th Switzerland Vacation Day.

Free Wi-Fi in hotels or high-tech communication of carefully nurtured stereotypes: Under the heading "Guest 3.0", the needs of future visitors to Switzerland were outlined by specialists. Additionally, in a live poll, 92 % of participants voted in favour of holding the 2022 Winter Olympics in Switzerland – a strong plea for tourism that, regrettably, the people of Grisons did not heed.



Experts at the 15th Switzerland Vacation Day in Zürich.

Left: Federal Councillor Ueli Maurer.

Right: 1,480 participants flocked to Zürich's Hallenstadion on 15 June 2012.

3rd Hotel Marketing Day.

For the past three years, ST and the Swiss Hotel Association "hotelleriesuisse" have organised the Hotel Marketing Day, offering industry partners an opportunity to exchange views on developments in the field. At this year's gathering, e-marketing experts explored various aspects of social media, hotel websites and accommodation rating platforms with the 300 participants.

Facts and figures.

Strategic partnerships	2012	2011
Strategic premium partners	4	3
Strategic partners	11	9
Official partners	16	18
Special partners	2	2
Revenue from sponsorship*	CHF 9.6 m	CHF 8.6 m

* Including barter arrangements, exclusively granted discounts and non-valued additional services

Exploiting synergies.

Quality and a concentrated dose of Swissness are the focus when ST plans shared marketing activities with strategic and official partners.

From Kambly and Victorinox to SWISS and the Rhaetian Railway, ST's strategic and official partners gain attractive platforms for the global marketing of their products and services and, as a result of their collaboration, benefit from ST's strong market presence. In return, they support ST financially and with benefits in kind – products and services that make the campaigns possible. Thanks to these synergies, ST and its partners can access new markets and open up new channels of communication. Such collaborations generate excellent media coverage through targeted campaigns, even in existing mar-

kets. The strategic partnership with UBS in Switzerland, for example, shows how profitable collaborative projects can be for both parties. The boat campaign (page 31) attracted around 506,000 Swiss people onto the country's lakes and rivers in the autumn.

“Our partnership is appreciated, and underlines our presence in Switzerland.”

Tom Ackermann, Head Marketing, UBS Switzerland



A hotspot for tourists.

For the first time, holidaymakers as well as business travellers in Switzerland can go online anywhere without having to pay roaming charges, thanks to the Pocket Connect mobile hotspot from Swisscom. With the support of ST, Swisscom was quickly able to set up an extensive network of rental outlets, while also involving other ST partners (SBB, RhB and Europcar).



Appetizing showcase.

The flexible new “sampling wall” that forms an integral part of ST's trade-fair stand serves both as a presentation showcase for food partners and as a tasting corner. The feature proved a major attraction at trade fairs worldwide in 2012, when three ST partners – Chocolat Frey, Kambly (biscuits) and Ricola (herb drops) – impressed visitors with their products.

Hotel overnights.	Overnights 2012	Overnights 2011	Change 2012/2011	Change 2012/2011 in %	Overnights 2002	Change 2012/2002	Change 2012/2002 in %
Priority markets	26,465,427	27,466,525	-1,001,098	-3.6 %	27,181,844	-716,417	-2.6 %
Switzerland	15,690,035	15,752,367	-62,332	-0.4 %	15,014,758	675,277	4.5 %
Germany	4,625,384	5,207,892	-582,508	-11.2 %	5,724,737	-1,099,353	-19.2 %
UK (with Ireland)	1,607,958	1,765,012	-157,054	-8.9 %	1,915,719	-307,761	-16.1 %
France	1,525,178	1,492,131	33,047	2.2 %	1,587,520	-62,342	-3.9 %
USA	1,318,460	1,394,166	-75,706	-5.4 %	1,168,956	149,504	12.8 %
Italy	971,776	1,007,519	-35,743	-3.5 %	935,928	35,848	3.8 %
Netherlands	726,636	847,438	-120,802	-14.3 %	834,226	-107,590	-12.9 %
Active markets	3,276,126	3,320,187	-44,061	-1.3 %	2,913,469	362,657	12.4 %
Belgium (with Luxembourg)	720,628	793,538	-72,910	-9.2 %	831,371	-110,743	-13.3 %
Japan	509,757	479,743	30,014	6.3 %	690,534	-180,777	-26.2 %
Nordic countries (Denmark, Finland, Norway, Sweden)	496,176	537,138	-40,962	-7.6 %	360,876	135,300	37.5 %
Austria (with Hungary)	465,153	484,630	-19,477	-4.0 %	390,673	74,480	19.1 %
Spain	434,669	451,463	-16,794	-3.7 %	304,371	130,298	42.8 %
Australia (with New Zealand and Oceania)	284,710	270,650	14,060	5.2 %	178,274	106,436	59.7 %
Canada	231,642	228,137	3,505	1.5 %	165,447	66,195	40.0 %
Korea (Rep.)	172,467	167,866	4,601	2.7 %	98,553	73,914	75.0 %
Singapore	129,970	109,074	20,896	19.2 %	45,650	84,320	184.7 %
Czech Republic	107,324	105,436	1,888	1.8 %	53,110	54,214	102.1 %
Thailand	101,281	93,402	7,879	8.4 %	57,105	44,176	77.4 %
Malaysia	57,018	50,573	6,445	12.7 %	41,876	15,142	36.2 %
Strategic growth markets	3,160,576	2,872,881	287,695	10.0 %	1,380,098	1,780,478	129.0 %
China	835,699	677,220	158,479	23.4 %	178,485	657,214	368.2 %
Russia	561,490	513,754	47,736	9.3 %	232,183	329,307	141.8 %
Gulf states	518,842	418,609	100,233	23.9 %	289,227	229,615	79.4 %
India	474,882	460,440	14,442	3.1 %	200,202	274,680	137.2 %
Brazil	194,492	201,298	-6,806	-3.4 %	105,577	88,915	84.2 %
Poland	140,502	150,097	-9,595	-6.4 %	70,053	70,449	100.6 %
Developing market	168,392	163,041	5,351	3.3 %	175,977	-7,585	-4.3 %
Israel	168,392	163,041	5,351	3.3 %	175,977	-7,585	-4.3 %

Overnights at Swiss hotels and health establishments (by selected countries of origin, in some cases accumulated)
Source: Federal Statistical Office 2012, 2011 and 2002

A shift in the impetus for growth – a ten-year perspective.

The Swiss hotel sector ends the year 2012 with a fall in overnights of -2.0% compared with 2011. The main cause is marked declines in neighbouring European markets (-9.1 % in the Eurozone), where the exchange rate was a decisive factor. The domestic market proved once again to be strong. Distant growth markets, meanwhile, partly compensated for declines in Europe. Overall, though, a negative trend continued in 2012. Impetus for tourism growth in Switzerland's foreign markets is increas-

ingly coming from Asian countries and overseas. A look back over the past ten years shows the magnitude of this shift. Compared with 2002, overnights from priority markets have fallen by -2.6 % (-716,000 overnights), while the corresponding figure for strategic growth markets has risen by +129 % (+1.8 million overnights). The active markets, too, helped offset declines in traditionally strong European source markets, with growth of +12 % (+363,000 overnights). Regional analysis, however,

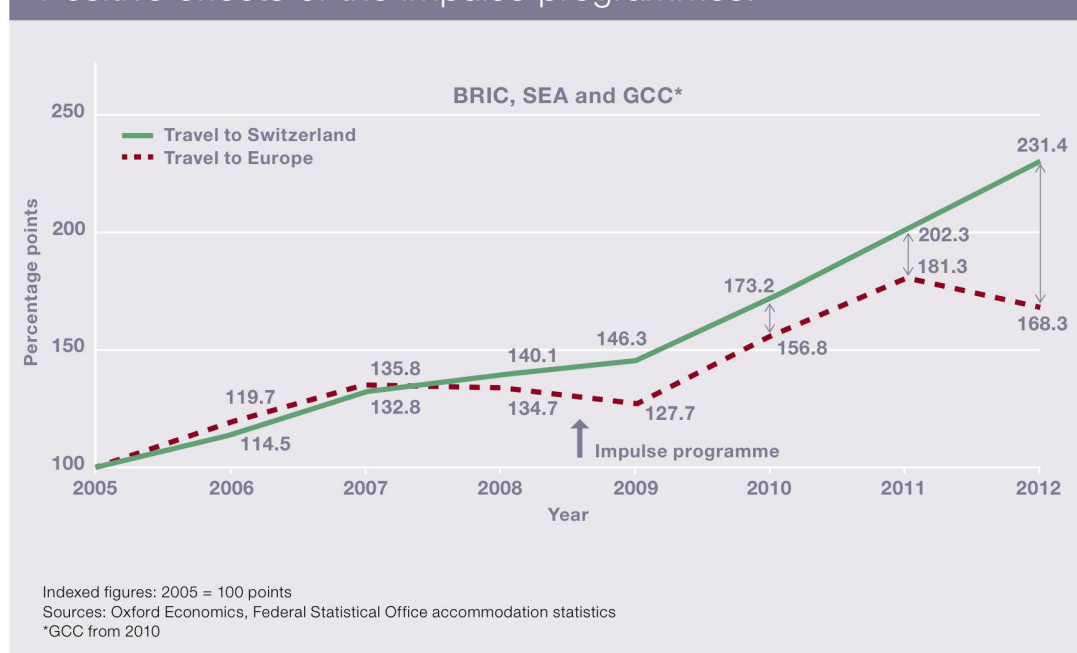
reveals that growth can be attributed above all to an increase over ten years of 2.4 million overnights in Swiss cities (+33.3 %). The traditional tourist areas in the Alps, meanwhile, show a decline of -5 % (-848,000 overnights).

Good international positioning.

Compared with other countries, Switzerland is strongly positioned in strategic growth markets. This is evident from a comparison of the evolution of hotel overnights in Switzerland and the rest of Europe (see graph below). The figures reveal that the number of overnights from these source markets grew at a faster rate in Switzerland than in other European countries, with Switzerland succeeding in winning market share. The additional spending through the three completed impulse programmes paid off: the graph shows how growth in Switzerland clearly overtook that in Europe in parallel with the

extra investment. Similarly in 2012, Switzerland was able to increase significantly the volume of overnights compared with the previous year (+14 %), while the rest of Europe saw an overall drop in numbers. Since 2005, Switzerland succeeded in increasing the number of overnights from strategic growth markets by 131 percentage points, while in Europe growth was significantly lower at 68 percentage points. In this way, the extra funds invested have successfully driven exploitation of the potential of the new markets. The last impulse programme came to an end with the 2012/2013 winter season.

Positive effects of the impulse programmes.



The overall balance.

Subdued consumer confidence in neighbouring markets also posed a challenge for the non-hotel accommodation sector. The major providers of holiday apartments had to cope with falls in turnover.* By contrast, Swiss Youth Hostels registered an increase in revenue (+3.6%), while development in the camping sector stagnated.** According to the provisional final result of the Tourism Development Index (ITE), the tourist sector showed a slightly negative development in 2012.*** The index, published by ST for the first time, sank 3.3 points compared with the previous year.

Sector	Change
Non-hotel accommodation*	→
– Second homes	→
– Holiday apartments and Reka	↘
– Youth hostels	↗
– Camp sites	→
– Bed & breakfast	↗
Hotel accommodation	↘
Day excursions	↘

* Interhome (–10.7 %), Reka: (–7.6 %)

Source: Swiss Non-hotel Accommodation Association 2013

** Source: Swiss Non-hotel Accommodation Association

*** Source: Tourism Development Index 2013, Switzerland Tourism