

Switzerland Tourism.



# 2012 annual report.

[MySwitzerland.com](http://MySwitzerland.com)





Rhine Falls, Eastern Switzerland / Liechtenstein

# Editorial.



Jean-François Roth,  
president of  
Switzerland Tourism.

## “An important boost in a time of crisis.”

### **What did the 2012 impulse programme achieve?**

Funds totalling 12 million Swiss francs were granted by parliament, and an additional 0.8 million Swiss francs came from our tourism partners and from us. This spending generated more than one million additional overnights, and accelerated our expansion in strategically important markets.

### **Parliament rejected the 2013–2015 special programme?**

Yes, by a few votes. It was intended to play a decisive role in speeding up market diversification. At the end of March 2013, we submitted a detailed report to the State Secretariat for Economic Affairs (Seco) regarding the different impulse programmes undertaken by ST since 2009.

### **Has this impulse programme had any impact yet?**

The results clearly show the powerful effect of this spending. The individual impulse programmes have produced a lasting reinforcement of our presence in China, India, the Gulf states and in Southeast Asia. As a result, Switzerland has succeeded in gaining important market share.



Jürg Schmid,  
CEO of  
Switzerland Tourism.

## “A dual strategy is essential.”

### **What was the greatest challenge for ST in 2012?**

Without doubt it was the combination of the strong Swiss franc and the tough economic situation in Europe. To face it, we needed to maintain our full range of marketing activities in Europe and the US and at the same time expand our presence in the highly promising distant markets. This dual strategy is essential, but it is also a great challenge.

### **What is the most positive trend of the year, in your view?**

Our geographical diversification is bearing fruit. In Switzerland, the growth in overnights by tourists from China, India, Russia and the Gulf states is clearly outpacing the growth registered in the last five years by our European competitors for the same nationalities (page 15).

### **And the most unwelcome trend?**

The fact that we lost ground in Germany over the whole year, without being able to discern any signs of recovery. Between 2009 and 2012, the number of overnights by our German guests fell by 25%. One of our most important challenges in 2013 will be to reverse this trend.



# Contents.



Schweiz Tourismus  
Tödistrasse 7, Postfach  
CH-8027 Zürich

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Addresses and contact details for all ST representations worldwide can be found at [www.stnet.ch/stoffices](http://www.stnet.ch/stoffices)

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## About Switzerland Tourism.

Selling Switzerland	7
Strategic challenge	8
Distinction through quality and cooperation	9
ST staff surveyed	9
The ST network	10
Tourism marketing: a modular approach	11
ST membership pays off	12
Exploiting synergies	13
Evolution of overnights	14

## Marketing strategy.

ST's marketing campaigns	17
Strong in the growth markets	18
Multistage market assessment	19
ST's marketing model	19
Promotion	20
E-marketing	21
Key media management	22
Key account management	23

Impulse programme 2012	24
------------------------	----

## Main campaigns.

### Cities.

Refreshing trendsetters	26
Facts and figures	27
Examples from the markets	27

### Summer.

Facts and figures	29
Summer in the land of water	29
Examples from the markets	30

## Meetings.

International perspectives	32
Facts and figures	33
Examples from the markets	33

### Winter.

Facts and figures	35
Snow-white Switzerland	35
Examples from the markets	36

## Focus.

Focus on Brazil	39
Social media on the rise	40
Focus on France	42
Focus on Australia	43
Awards and prizes	44
Outlook	45

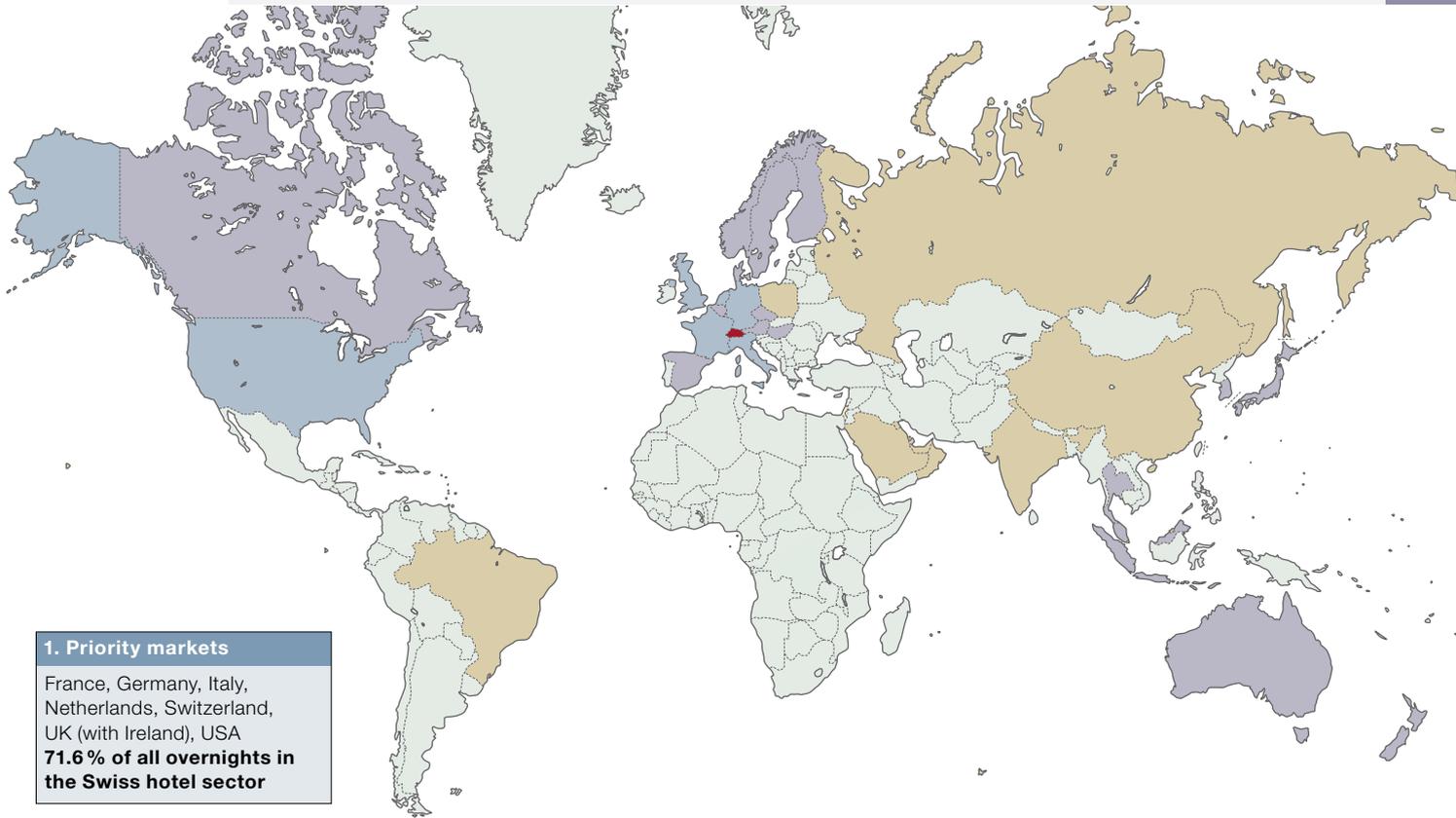
<b>Figures and names.</b>	46
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Cover photograph: St. Saphorin, Lavaux, UNESCO World Heritage, Lake Geneva Region

# 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.



## 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.



Nature



Authenticity

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 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.

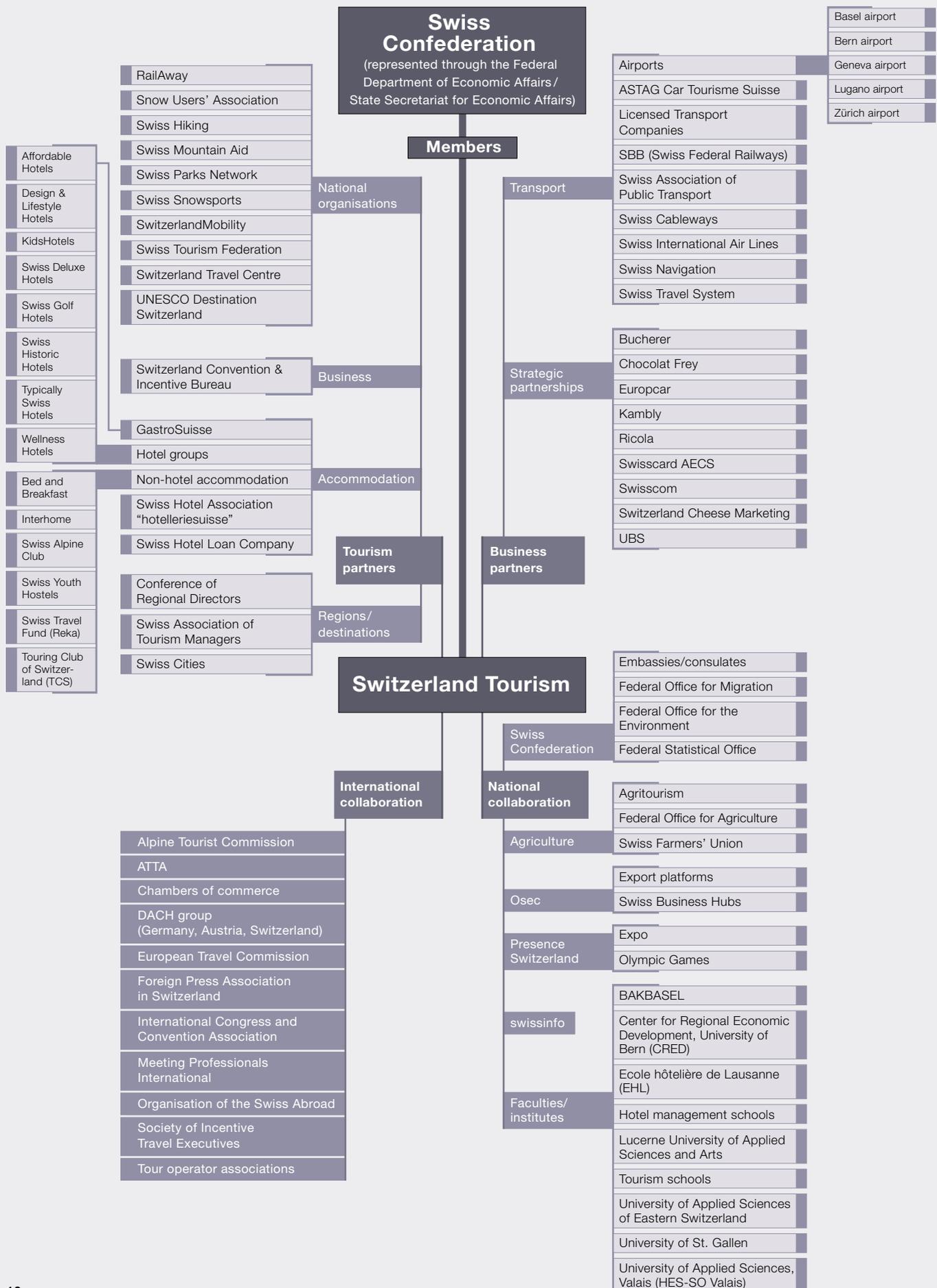
ST carried out a detailed staff survey as part of the judging process for the Swiss Arbeitgeber Award

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
<b>Specific cooperation alliances</b>	<b>Campaigns</b> Summer Winter Cities Meetings Theme products	<b>Hotel products</b> Affordable Hotels Design & Lifestyle Hotels KidsHotels Swiss Deluxe Hotels Swiss Golf Hotels Swiss Historic Hotels Typically Swiss Hotels Wellness Hotels	<b>Interest groups</b> 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
<b>Specific sector services</b>	Mailing house Brochure production Data management Tourism Monitor Switzerland		MySwitzerland.com for you e-CRM for you Holiday home marketplace	
<b>Additional market presence</b>	Trade fairs Media events Market cooperation alliances		Switzerland Travel Experience (STE) Roadshows/workshops Special offers	
<b>Basic marketing (basic mandate)</b>	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](http://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



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.

### 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.

### 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 %
<b>Priority markets</b>	<b>26,465,427</b>	<b>27,466,525</b>	<b>-1,001,098</b>	<b>-3.6 %</b>	<b>27,181,844</b>	<b>-716,417</b>	<b>-2.6 %</b>
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 %
<b>Active markets</b>	<b>3,276,126</b>	<b>3,320,187</b>	<b>-44,061</b>	<b>-1.3 %</b>	<b>2,913,469</b>	<b>362,657</b>	<b>12.4 %</b>
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 %
<b>Strategic growth markets</b>	<b>3,160,576</b>	<b>2,872,881</b>	<b>287,695</b>	<b>10.0 %</b>	<b>1,380,098</b>	<b>1,780,478</b>	<b>129.0 %</b>
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 %
<b>Developing market</b>	<b>168,392</b>	<b>163,041</b>	<b>5,351</b>	<b>3.3 %</b>	<b>175,977</b>	<b>-7,585</b>	<b>-4.3 %</b>
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-

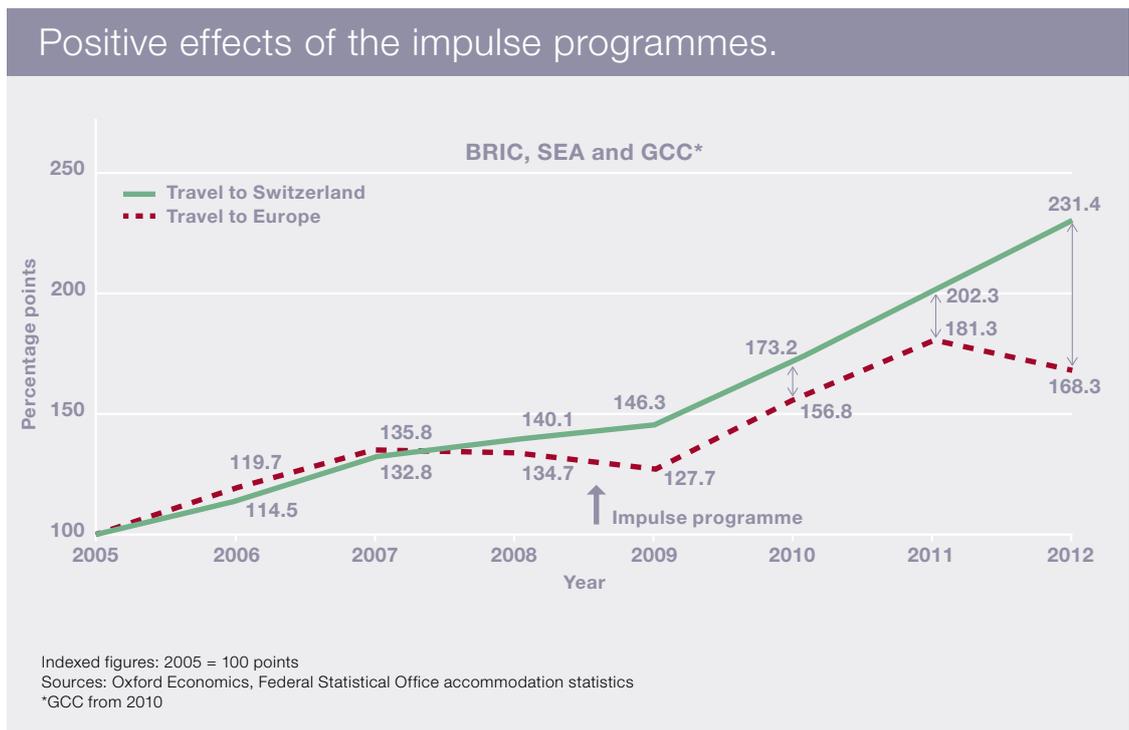
ingly coming from Asian countries and overseas. A look back over the past ten years shows the magnitude of this shift. Compared with 2002, overnights from priority markets have fallen by -2.6% (-716,000 overnights), while the corresponding figure for strategic growth markets has risen by +129% (+1.8 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.



## 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.

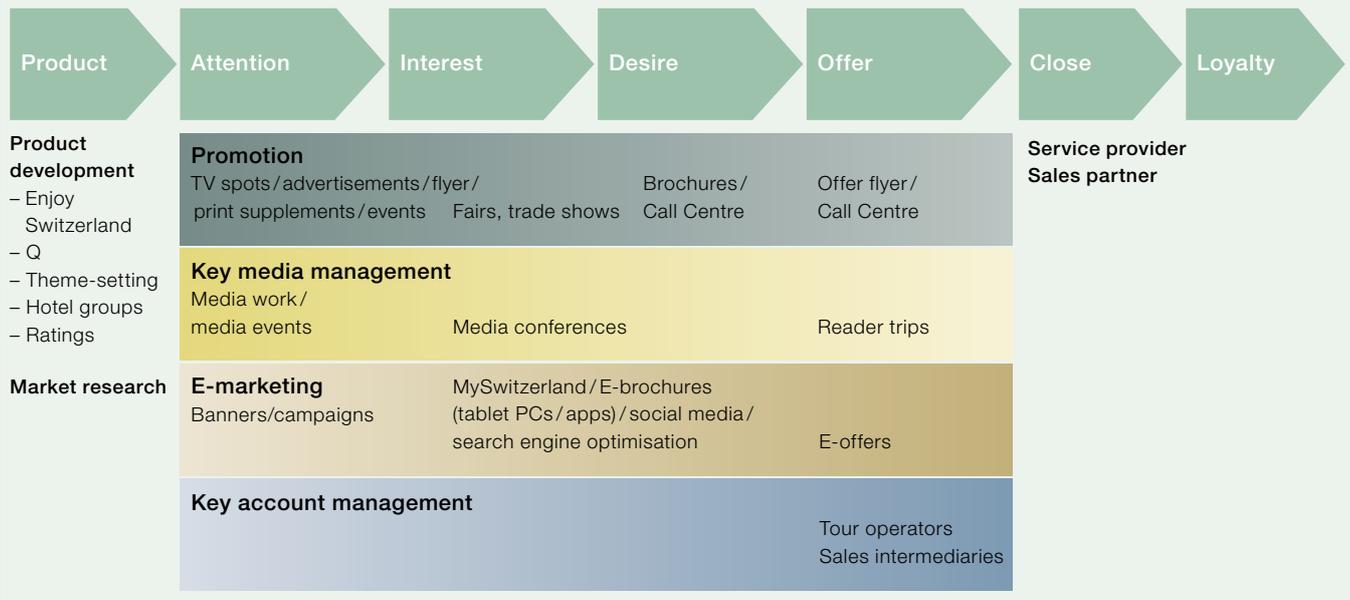
Sector	Change
<b>Non-hotel accommodation*</b>	→
- Second homes	→
- Holiday apartments and Reka	↘
- Youth hostels	↗
- Camp sites	→
- Bed & breakfast	↗
<b>Hotel accommodation</b>	↘
<b>Day excursions</b>	↘

\* 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



Marketing strategy.

## Integrated ST Marketing.



Marketing strategy.

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
<b>Priority markets</b>					
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*
<b>Active markets</b>					
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
<b>Strategic growth markets</b>					
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
<b>Developing market</b>					
Israel	(1)	44	55,373	1,200	1,000,000
<b>Others</b>					
			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.

<p><b>Promotion: stimulating interest.</b></p> <p>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.</p>	<table border="1"> <thead> <tr> <th>Year</th> <th>Percentage</th> </tr> </thead> <tbody> <tr> <td>2007</td> <td>65.1 %</td> </tr> <tr> <td>2012</td> <td>54.2 %</td> </tr> <tr> <td>2017</td> <td>40 %</td> </tr> </tbody> </table>	Year	Percentage	2007	65.1 %	2012	54.2 %	2017	40 %
Year	Percentage								
2007	65.1 %								
2012	54.2 %								
2017	40 %								
<p><b>E-marketing: conducting dialogue.</b></p> <p>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.</p>	<table border="1"> <thead> <tr> <th>Year</th> <th>Percentage</th> </tr> </thead> <tbody> <tr> <td>2007</td> <td>8.8 %</td> </tr> <tr> <td>2012</td> <td>21.1 %</td> </tr> <tr> <td>2017</td> <td>29 %</td> </tr> </tbody> </table>	Year	Percentage	2007	8.8 %	2012	21.1 %	2017	29 %
Year	Percentage								
2007	8.8 %								
2012	21.1 %								
2017	29 %								
<p><b>Key media management: helping the media.</b></p> <p>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.</p>	<table border="1"> <thead> <tr> <th>Year</th> <th>Percentage</th> </tr> </thead> <tbody> <tr> <td>2007</td> <td>5.6 %</td> </tr> <tr> <td>2012</td> <td>8.9 %</td> </tr> <tr> <td>2017</td> <td>10 %</td> </tr> </tbody> </table>	Year	Percentage	2007	5.6 %	2012	8.9 %	2017	10 %
Year	Percentage								
2007	5.6 %								
2012	8.9 %								
2017	10 %								
<p><b>Key account management: creating tours.</b></p> <p>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.</p>	<table border="1"> <thead> <tr> <th>Year</th> <th>Percentage</th> </tr> </thead> <tbody> <tr> <td>2007</td> <td>20.5 %</td> </tr> <tr> <td>2012</td> <td>15.8 %</td> </tr> <tr> <td>2017</td> <td>21 %</td> </tr> </tbody> </table>	Year	Percentage	2007	20.5 %	2012	15.8 %	2017	21 %
Year	Percentage								
2007	20.5 %								
2012	15.8 %								
2017	21 %								

## 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
<b>MySwitzerland.com</b>			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
			Social media contacts	435,547	170,000

\* WEMF-certified  
\*\* Including impulse programme

## 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.



### 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.

„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

## 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.



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.



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.

## 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	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



Main campaigns.

# Cities.

## Refreshing trendsetters.

Many Swiss cities enjoy an idyllic lakeshore or riverbank setting, with an enviable lifestyle to match. This year, ST chose water as its main theme.

Basel's cultural variety, Bern's historic charm, Geneva's international atmosphere: each is inviting, yet it is the cities' waterside setting that crowns their irresistible allure. Smaller cities, too, typically owe their unique appeal to a lake or river. Hence the theme of ST's summer campaign: Switzerland – Land of Water.

Main partners for the Cities campaign:

**Basel**<sup>+</sup>  
Culture Unlimited.

**BERN**<sup>+</sup>

**GENÈVE**  
A WORLD OF ITS OWN<sup>®</sup>

**Lausanne**  
OLYMPIC CAPITAL

**LUGANO**<sup>+</sup>  
swiss mediterranean style

**LUZERN**<sup>+</sup>  
THE CITY. THE LAKE. THE MOUNTAINS.

St.GallenBodensee  
explore enjoy learn

...winterthur...

**zürich**<sup>+</sup>  
BERNESE ALPS MARK



## International.

### Always at hand: the top city tips.

ST's "Tempting city breaks." e-brochure, available on iPad, leads users on 24-hour tours through each of 24 Swiss cities, taking in the famous sights as well as revealing plenty of insider tips. Meanwhile the City Guide app, already popular in iPhone format, is now available for Android, with a wide variety of functions and covering eight Swiss cities. 138,843 users downloaded the app in 2012.

## Facts and figures.

Cities	2012	2011
Budget	CHF 8.2 m	CHF 10.2 m*
Share of total budget	8.1 %	10.8 %
Target markets	BE, CH, DE, ES, FR, IT, RU, UK, US (with CA)	
Brochures distributed	3 m	4 m
Participants on ST media trips	381	332
Media conferences in Switzerland and abroad	23	24
Media contacts (readers, viewers, listeners)	2.09 bn	2.3 bn
All figures including impulse programme		

\* Increased marketing activities ("Cities." TV ad)

”Switzerland’s beautiful landscapes inspired Korea.”

Seunghoon Kim, Marketing Communications Manager at Sony Korea Corporation

## USA.

### Switzerland underground in New York.

The New York City Subway’s 42nd Street Shuttle links Grand Central Station and Times Square, carrying about four million passengers a day. For a full month in spring, travellers found themselves in a little corner of Switzerland: the carriages were decorated inside and out with Swiss images. The campaign was accompanied throughout by promotions, events and competitions.



A full Switzerland makeover: a carriage of the 42nd Street Shuttle of the New York City Subway.

## Korea.

### Sony focuses on Switzerland.

In Korea, Sony’s latest camera model focused entirely on Switzerland. As a key travel companion, its duty is to accompany its owner to the most beautiful destinations. For two months, superb images of Switzerland’s cities and mountains appeared on Korean TV as well as in cinemas and magazines, achieving a total of 4.2 billion media and marketing contacts. ST supported Sony Korea in a variety of ways, including production of the campaign in Switzerland.



## China.

### Swiss festival rhythm.

For the third time, Zürich’s China Drifting festival brought together Chinese and Swiss artists. This year’s event reached its climax at the Street Parade, when Chinese DJs pitted themselves against their European counterparts. Under the title “Swiss Kiss”, ST launched a social media competition in China, with a trip to Zürich’s techno party as the main prize. Eight journalists from all regions of China accompanied ravers and DJs on their journey and produced a series of detailed reports on Switzerland’s summer of festivals.



Summer.



## Facts and figures.

Summer	2012	2011
Budget	CHF 45.8 m	CHF 41.9 m
Share of total budget	45.4 %	44.5 %
Target markets	worldwide	worldwide
Brochures distributed	29 m	32 m
Visits to MySwitzerland.com	13.2 m*	11.7 m*
Participants on ST media trips	877	940
Media contacts (readers, viewers, listeners)	4.0 bn	4.1 bn
KAM-generated overnights	2.8 m	2.8 m

All figures including impulse programme  
\*Including Cities campaign pages

## Summer in the land of water.

For “2012, year of water”, ST produced a torrent of refreshing ideas for all kinds of attractive, original and authentic holiday experiences.

Switzerland is known as “Europe’s reservoir”, and the opportunities for holidays on the water are greater and more varied than anywhere else. Crystal-clear alpine lakes, mighty glaciers and picturesque waterfalls dot the landscape; historic paddle steamers ply lakes that are pure enough to drink, calling at enchanting towns and cities; mountain rivers offer thrilling white-water rafting; and four major rivers rise here. In “2012, year of water”, ST was able to promote Switzerland to perfection.

### Varied and good value

The website MySwitzerland.com carried more than 200 ideas for holidays in, on and by the water. A wealth of other practical travel information, along with inspiring images, appeared in the summer edition of a new print product, “Switzerland. The holiday magazine.” – with 400,000 copies printed in six languages. In addition, ST produced “Mountains and lakes.”, a user-friendly e-brochure, as well as “Accommodation on the water.”, a brochure featuring more than a hundred attractive hotels, campsites and other places to stay. In collaboration with UBS, ST also published the “Top 150 water experiences.” brochure, available through all of the bank’s 300 branches and elsewhere.

ST, with GastroSuisse, also showed how Switzerland can offer excellent value, with a brochure highlighting 222 affordable hotels. A dedicated page on ST’s website, MySwitzerland.com/top50, lists the 50 best of-fers, constantly updated with discounts and exclusive extras.

Sebi and Paul returned, too: in a new TV ad, Switzerland’s much-loved tourism ambassadors made the land of water ready for summer holiday visitors. The clip achieved an impressive 245 million marketing contacts internationally, with 730,000 clicks on YouTube.

Main tourism partners for the Summer campaign:



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## Switzerland.



From left: Gaudenz Thoma, CEO of Graubünden Tourism, Jürg Schmid, CEO of Switzerland Tourism, Ernst Bromeis, swimmer and water ambassador, Dumeni Columberg, mayor of Disentis/Mustér.

### Experiencing the “Blue Wonder”.

The project was as daring as it was ambitious: on 2 May, the Swiss extreme athlete Ernst Bromeis climbed into the icy waters of Lake Toma, in Graubünden – at the source of the Rhine – with the goal of swimming the length of the river to its mouth in the North Sea in four weeks. ST accompanied him, to draw attention to Switzerland as “Europe’s reservoir”, with six media events along the 1,230 km route. The unexpectedly tough conditions and in particular the extreme cold took such a toll on Bromeis that he had to abandon his project after two weeks, exhausted. Nature proved herself to be stronger than us – perhaps in itself a reason for the enormous and positive coverage the challenge gained throughout Europe, achieving 334 million media contacts.

”The beautiful film locations in Switzerland fit the storyline perfectly.”

Mazen Ayyad, chairman of the Ayyad Group production company

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## Japan.

### UNESCO World Heritage on display.

With 3.6 million people passing through every day, Tokyo’s Shinjuku is the world’s busiest railway station. At a highly prominent position here, ST erected an impressive showcase for Switzerland (400 m²). At its focus were the eleven Swiss UNESCO World Heritage Sites and presentations by ST’s strategic partners: Bucherer, Switzerland Cheese Marketing and Victorinox. The operation was accompanied by a big advertising campaign, and attracted around 750,000 visitors.



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## Czech Republic.

### Alpine dairy farmers in Prague.

Every October, in the heart of Prague, ST celebrates the annual descent of Swiss farmers and livestock from the high pastures with a traditional alpine festival featuring ornately adorned animals. This year’s spectacle was more popular than ever, attracting over a thousand visitors. ST and its partners – Valais, Nendaz, Rhaetian Railways, Jungfrau Railways and Swiss Travel System – also distributed Czech-language brochures promoting the attractions of the Swiss summer and winter.

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## Gulf states.

### Images of Bern during Ramadan.

One of the Gulf states’ most popular TV dramas was filmed in Interlaken and Bern, thanks to the initiation and support of ST. In all, 30 episodes showing irresistibly beautiful images of Switzerland were broadcast at peak viewing times during the month of Ramadan; more than 21 million people followed the series. A presence on Arabic-language TV also offered ST’s partners the possibility for product placements.

## Germany.

### Frankfurt dances to Switzerland's beat.

A mountain village with wooden chalets, a historic Jungfrau Railways carriage with nostalgic photo service, a stylish lounge and Swiss bands on stage: the Swiss Street Festival in Frankfurt attracted 100,000 visitors, making it one of the city's biggest open-air events. ST and nine tourism partners offered visitors a variety of experiences of Switzerland in the form of music, activities and gastronomic treats, enticing them with original holiday offers and excursion ideas that drew attention to the festival's theme: "Switzerland – Land of Water".

## Switzerland.

### Ship ahoy! Afloat with UBS.

A voucher covering a day's travel on all of Switzerland's lakes and rivers for just five francs was UBS's way of saying thank you to the Swiss people on its 150th anniversary. The ST-UBS partnership once again worked perfectly: the giveaway dovetailed with ST's summer campaign featuring Sebi and Paul, while UBS promoted it actively at all its branches and via customer mailings. As a result, UBS's anniversary offer became a talking-point across Switzerland, giving a broad cross-section of the population a wonderful day out and highlighting ST's theme for the year: "Switzerland – Land of Water". The campaign also raised the profile of the Association of Swiss Navigation Companies, generating additional business. By the end of the season, members of the public had redeemed 506,000 vouchers out of 1.2 million distributed.



Sebi and Paul in action: UBS's boat cruise campaign attracted several hundred thousand Swiss.

## United Kingdom.

### Olympic appearance for Switzerland.

As one of the main partners of Presence Switzerland, ST ensured plenty of excitement at London's House of Switzerland during the Olympics. Mammut's climbing wall alone attracted more than 3,000 challengers, offering a taste of Swiss summer adventure. Enticing brochures, fun social media offers and personal advice made the venue a full-blown information centre for Switzerland as a holiday destination.



## International.



### Media trip to the heart of Switzerland.

140 print journalists, photographers, bloggers, TV programme makers and radio reporters from 30 countries and nearly every continent took up the invitation from ST and Lucerne Tourism to join the big annual media trip – a week in late summer starting in Lucerne and the surrounding area. Afterwards, participants could choose to explore some of the country's most beautiful regions, from Engadin and Ticino to Valais and the Jura. Focus of the trip was Switzerland as land of water, full of variety.



## International perspectives.

Conferences mean full hotels: ST won business in the new markets of China, India and Brazil, as well as in Europe and North America.

Already about one-fifth of all overnight stays in Switzerland are generated by the conference tourism sector. 23 ST specialists work under the name of Switzerland Convention & Incentive Bureau (SCIB) to market Switzerland as a location for meetings, with an emphasis on attracting multi-day events for foreign companies and international associations.



Interactive communication platform: Caroline Pidroni, ST North America (far right), in conversation with the media.



### USA.

#### Switzerland fields a powerful team.

IMEX America is the largest trade fair in North America for incentive trips, meetings and events, and with 8,400 participants offers an important marketing platform. ST organised and coordinated a strong representation, with 13 Swiss partners occupying 80 m<sup>2</sup> of space. An entertaining competition and ST's lounge attracted visitors' attention, leading to many fruitful discussions.

## Facts and figures.

Meetings	2012	2011
Budget	CHF 6.2 m	CHF 5.8 m
Share of total budget	6.2 %	6.2 %
Tourism revenue	CHF 65.0 m	CHF 60.3 m
Visits to MySwitzerland.com/meetings	259,333	177,789
KAM-generated overnights	194,749	172,422
Number of meetings, events & conferences	710	664
Number of quotation requests processed by SCIB	1,191	1,366

All figures including impulse programme

## China.

### Study trip to Switzerland.

In 2012, ST's SCIB department extended its market presence in the cities of Beijing, Shanghai, Hong Kong and Guangzhou. An important element was educational training for incentive agencies and other important decision makers. To this end, SCIB coordinated a study trip for 12 incentive-travel organisers to Zürich, Lucerne and the Tittlis – which has already led to follow-up business.



Participants on the study trip from China on their excursion up the Tittlis.

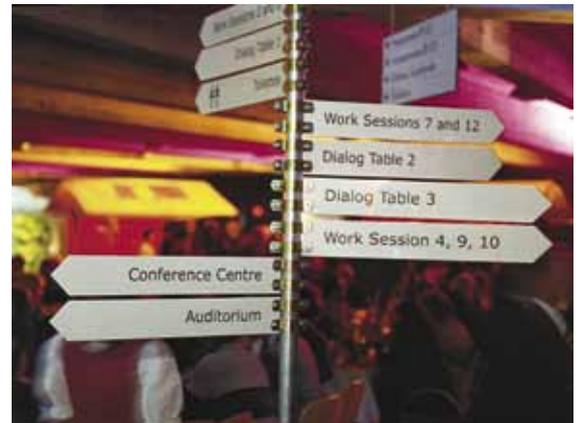
”The MICE event persuaded me that Switzerland has a tremendous amount to offer.”

Sergey Porotikov, Aviatour Business Travel Co.

## Switzerland.

### “Meetings Report Switzerland” says it all.

The first comprehensive statistical survey of the meetings sector, covering all events with at least ten participants, revealed that 19% of all hotel overnights – a total of 6.6 million – were generated by meeting attendees. The majority of these overnights took place in cities, where they accounted for more than one-third of overnight stays. Marketing activities abroad and investment in the business hotel sector are therefore vitally important for Switzerland to position itself as a top destination in the meetings sector.



## Russia.

### Quiz with a Swiss flavour.

ST invited 110 MICE specialists from Russia to two events in Moscow showcasing the wide variety of incentive opportunities on offer in the Geneva region and around Flims-Laax-Falera. The events also incorporated a cookery show and a fun quiz, which offered participants an entertaining way of getting to know Switzerland as a MICE destination. The events were a great success, leading to 140,000 media contacts and several enquiries – and an incentive trip to Montreux with 75 participants totalling 300 overnights.



Winter.



## Facts and figures.

Winter	2012/2013	2011/2012
Budget	CHF 21 m	CHF 19.5 m
Share of total budget	20.8 %	20.8 %
Target markets	worldwide	worldwide
Brochures distributed	15.2 m	15.3 m
Visits to MySwitzerland.com	13.2 m*	13.1 m*
Participants on ST media trips	648	676
Media contacts (readers, viewers, listeners)	2.4 bn	3.1 bn
KAM-generated overnights	1.1 m	1.1 m

All figures including impulse programme  
\*Includes Cities campaign pages

## Snow-white Switzerland.

For a truly restful winter holiday, Switzerland is unbeatable. In its latest Winter campaign, ST focused on the magic of snow-covered landscapes, on the delights of winter walks and the benefits of taking time to relax completely.

Sebi and Paul, Switzerland's cheerful holiday ambassadors, make an important point in their latest winter ad. As they tour hotels collecting alarm clocks, scale a church tower to remove the clock's hands and impose a crowing ban on the village cockerel, they show humorously what makes Switzerland special: doing everything to let visitors to relax completely.

### Time to relax

In a world that is moving ever faster, visitors' priority on holiday is to slow down and relax. ST developed this idea, and the resorts and hotels followed suit. From romantic night-time walks at Schwägalp, illuminated by hundreds of lanterns, to the "chillout piste" in St. Moritz and a host of great-value offers, Switzerland offered visitors a colourful variety of winter treats – and ST communicated the message in suitably inviting style.

For once, the focus was not on perfect pistes but on 5,100 km of prepared winter paths, on the enchanting scenery in every part of the country and on tips for winter treats – such as the delightful walk along the banks of the River Sarine.

Internet users could find the 36 most beautiful winter hikes on a free app incorporating detailed map sections and GPS support – as well as online at MySwitzerland.com, along with extensive additional material including tips for fine restaurants and top wellness facilities in the area. ST also added the new interactive "Winter." e-brochure to its free MySwitzerland iPad app, with details of 51 snow sports areas, gloriously illustrated. In addition, the Winter Sports Report at MySwitzerland.com/snow offered useful information on 250 winter sports resorts, updated daily with an attractive new look.

### Main tourism partners for the Winter campaign:



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## Belgium.



### Swiss winter experience in Antwerp.

Over four days, 25,000 people passing through Antwerp station found themselves in the heart of the Swiss mountains. The giant “Ski-Station Zwitserland” on the concourse caused a sensation, with all kinds of attractions including displays of folklore, interactive games such as snowshoe hiking, a photo shoot in a gondola and gastronomic treats. As well as organising the atmospheric event, ST coordinated extensive coverage, including peak-time broadcasts on national TV, articles in print media and special reports on public radio, achieving 2.5 million media contacts. ST also supplied web platforms and social media with a stream of attractive tips as well as a competition, and helped journalists produce reports about Switzerland as a travel destination.

”The activities at the winter event, and its high quality, created a great impression of Switzerland.”

Marleen De Keyzer,  
regular visitor from Belgium

---

## Brazil.

### From samba to skiing.

SKI Brasil is the most prominent skiing tour operator in Brazil. To market the Swiss winter, ST entered a long-term partnership with SKI Brasil, supporting it in a variety of ways, including with a special print run of 38,000 copies of the “Swiss Ski Guide” in Portuguese, educational workshops, a social media campaign and various promotions. The guide was distributed by the valet service of a famous department store in São Paulo.



A promising collaboration: (from left) Adrien Genier, Market Manager ST Brazil, Eduardo Gaz, CEO and owner of SKI Brasil, Arturo Kelmer, Marketing and Sales Specialist at Swiss International Air Lines.

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## Australia.

### Slim in Switzerland.

Images of the Swiss winter graced the TV screens of 4.4 million Australians for four-and-a-half hours thanks to mediation by ST – which also helped organise filming in the Jungfrau region of the four episodes of “The Biggest Loser”. On the programme, participants try to lose weight in various ways – including, on this occasion, by trying fun outdoor activities. Switzerland cut a fine figure: as a breathtakingly beautiful holiday destination that also promises healthy adventure.

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## International.

### Top winter walks on an app.

ST has gathered 36 of Switzerland’s most impressive winter walks in the new “Swiss Winter Hike” free iPhone app. Each hike – whether through snow-blanketed mountain villages in the Valais, across wide white moorland or tracing legendary tales in the Toggenburg – comes complete with maps and GPS support. Walkers can also download full details of the tours at [MySwitzerland.com/winterwalks](http://MySwitzerland.com/winterwalks).

## Nordic countries.

### Presence in first TV travel show.

The popular Norwegian TV channel Canal 9 has added a daily travel show to its schedule. The hour-long programme features items from all over the world, and is repeated several times each day. Thanks to support from ST and Switzerland Travel System (STS), Switzerland gained extensive coverage in six programmes, with a wide range of topics featured. Famous Norwegians from the worlds of gastronomy, journalism and sport talked about their experiences in Switzerland; ST supplied inspiring film footage. About 240,000 viewers tuned in to watch.

## USA.

### Final of “The Bachelor” in Switzerland.

When “The Bachelor” finally chooses the woman of his dreams, ratings for this American reality TV show rocket – especially among female viewers. As the series finale with the last three competing women took place in Switzerland, on ST’s invitation, ST had the perfect opportunity to present Switzerland to 30 million viewers in the USA and Canada as a dream holiday destination. The strategy carries high hopes of success: when couples or families choose a holiday destination, it is usually women who have the final say. ST made use of its full range of marketing techniques for the final of “The Bachelor”, including supplying material for women’s magazines and promoting a special “Bachelor” travel offer created with its partners Interlaken Tourism and Zermatt Tourism. Throughout, ST acted as the key intermediary between the TV show and local partners.



ST brought “The Bachelor” to Switzerland: (from left) Alex Herrmann, Director ST Americas, Maja Gartmann, Coordinator of Media Relations ST North America, Chris Harrison, presenter of the show “The Bachelor”.

## International.

### Working tirelessly for visitors.

In the new winter ad, “We do everything for a relaxing winter holiday”, Sebi and Paul remove the hands from watches and dispose of alarm clocks so visitors can enjoy their winter holidays without feeling the pressure of time. The charming and humorous ad delighted audiences far and wide – gaining 660,000 views on YouTube, and reaching 72.15 million TV viewers and cinemagoers worldwide.



## United Kingdom.



### Five ice blocks full of Swissness.

ST’s campaign “Reach Out + Touch it” created a real buzz across Britain. Five blocks of ice appeared at central London locations; frozen inside were small cards, each with a special code. About 200,000 passers-by used their imagination to melt the ice to get at one of the cards – and about 8,900 participants checked their code online to see if they had won one of the many prizes, including holidays in Switzerland. Various marketing measures, such as a game for smartphones, accompanied the campaign.



# Focus.

## Facts and figures.

Brazil	2012
Overnights in 2012	201,298
Overnights in 2002	105,577
Growth in overnights (2002–2012)	+90.7 %
Opening of the ST office in São Paulo (presence since 1999)	June 2012
Launch of MySwitzerland.com in Portuguese	2011
Advertising & marketing contacts	8.6 m

## Focus on Brazil.

**A Swiss market manager, a full and effective team, autonomously acting offices and additional marketing resources: ST's boosted presence in Brazil is having an impact – Brazilians are discovering Switzerland.**

Brazil is booming: the economy is prospering and consumer confidence is growing, partly thanks to new discoveries of raw materials, macro-economic stability and major forthcoming events such as the football World Cup (2014) and the summer Olympics (2016). ST is taking advantage of the economic optimism in Brazil, boosting its presence as well as introducing additional marketing resources to develop the market actively with Swiss partners. Efforts are bearing fruit: the number of overnights by Brazilians in Switzerland continues to rise, and annual growth of three to five per cent is a realistic target.



”The cities and summer are becoming increasingly important.”

Adrien Genier, Market Manager ST Brazil

### “World leader.”

Two questions to Adrien Genier, Market Manager ST Brazil:

#### **How do Brazilians see Switzerland?**

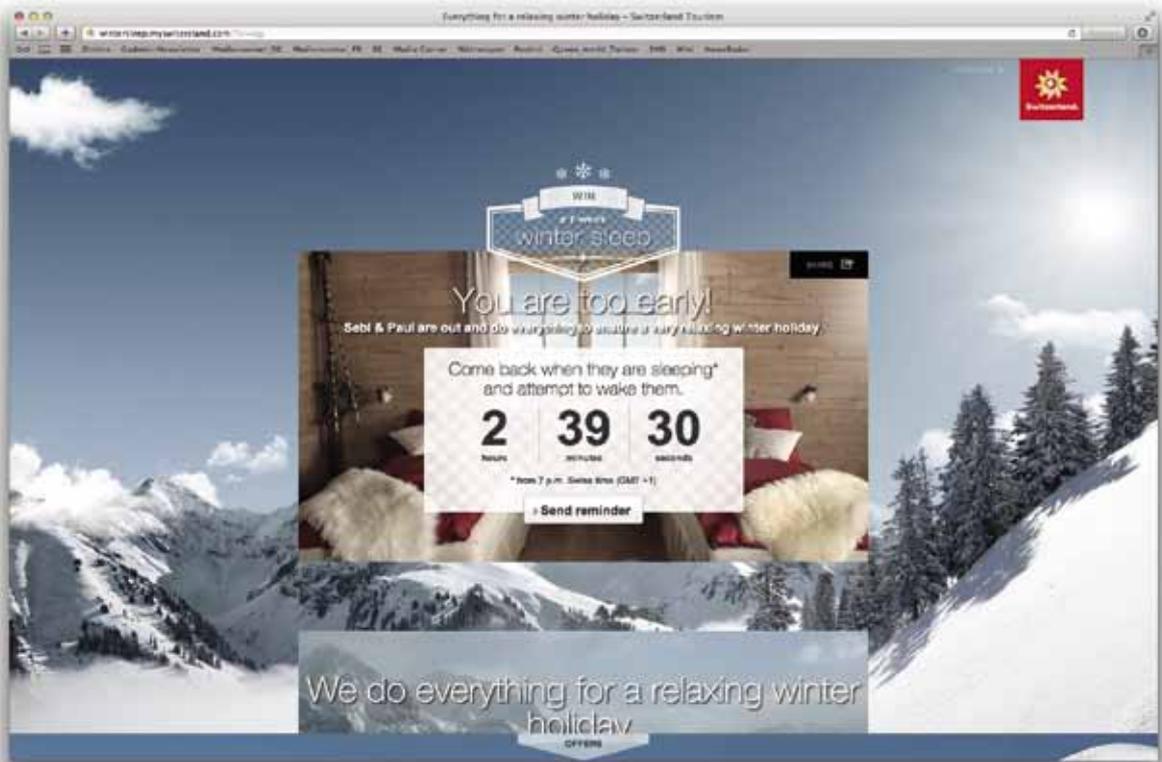
For them Switzerland is a winter and mountain destination – but the cities and summer are becoming increasingly important.

#### **Which channels will ST use to address Brazilian visitors?**

Alongside classic channels, we want to intensify our activities in e-marketing. Brazilian online travel portals showed growth of 45% in 2012. With 63 million Facebook users and internet use at 23 hours per month, Brazilians are world leaders. This offers tremendous potential.

### Switzerland from A to Z.

In the thriving Brazilian travel market, ST is developing a major role as key contact for travel agents. ST led the way by publishing “Destino: Suiça.”, a practical and comprehensive sales brochure for tour operators, gathering virtually all essential information about Switzerland. For the presentation of the brochure, ST invited important partners and tour operators to the famous restaurant Arola 23 in São Paulo, where it also held a press conference with specialist media. The event prompted a lively and stimulating exchange of ideas, and the feedback was entirely positive.



Winter online game (see page 21).

## Social media on the rise.

**ST has been pushing boundaries in social media, bringing immediate results and greatly extending ST's reach.**

The creation of the new position "Social Media Marketing Communication" is paying off, with "friends" and "followers" growing in all media. From Facebook to Twitter, from YouTube and Pinterest to Flickr, there is huge interest in ST. ST's rapidly growing Facebook page "MySwitzerland" is currently in ten languages; ST's Twitter account has six. Thanks to this online dialogue, ST has direct access to about 400,000 "friends".

ST has achieved this thanks to a clear strategy: for three years, it has been monitoring its "old" Facebook page to find out exactly what kind of content interests fans most – and how they get involved. ST has also encouraged dialogue, answering questions promptly, taking active part in discussions – and, as a result, becoming part of each person's own experience of Switzerland. ST is also communicating the same campaign messages worldwide, consistently and authentically, both online and offline, always in a personal way, direct but polite. This "integrated storytelling" is attracting a growing following online, stimulating lively interaction: about 50,000 "friends" regularly take part in ST's online activity.

One special reason for success is ST's frequent use of competitions: users know that time and again they will have the chance to win a holiday in Switzerland.

## USA.

### Andrew's odyssey through Switzerland.

"National Geographic" expertly integrates TV, magazines and the internet in its coverage. For its online reports it regularly sends Andrew Evans on trips, and his social media platform "Where's Andrew?" enjoys a cult following. In summer, Andrew travelled around Switzerland for a month on public transport, blogged about his experience, tweeted and posted on Facebook. As a face of "National Geographic", Andrew has great authority, and his reports reach a receptive audience. ST organised Andrew's tour through Switzerland as part of an integrated marketing project with advertisements and a comprehensive online presence, together with Engadin St. Moritz, Lake Geneva & Matterhorn Region, Interlaken, Jungfrau Region, Jungfrau Railways and STS/Rail Europe.

## China.



### A Swiss cross of sticky notes.

The strategic partners ST and SWISS used the launch of direct Zürich–Beijing flights for a social media campaign in China, in the form of a competition with holidays in Switzerland as a prize. Entrants had to choose an original background on which to attach sticky notes in the form of the tailfin of a SWISS plane – and then upload a photo of their work to the Chinese microblogging platform Weibo. 45,000 sticky notes were distributed by ST and SWISS sales channels and by promotional teams. The campaign had an overwhelming response – not just among participants, but also with Chinese media, who reported on the competition, reaching 114 million contacts. ST led the project, which also involved SWISS, Mammut, Bucherer, Victorinox and ST regional partners.

## “Social media is dialogue at eye level.”



Three questions to Katrin Schmitt, ST Social Media Marketing Manager:

### **Social media (SM) is dynamic. What keeps our followers interested?**

Our constant presence and trustworthiness. We continually offer tourism-related content that followers want to discuss with us and each other. Add the fact that we welcome questions, and SM dialogue is assured.

### **How can we set ourselves apart from rivals?**

With passionate, integrated storytelling: important messages carried in honest, engaging stories appropriate to the relevant community.

### **What is the future for ST social media?**

Alongside the major platforms we also make use of niche media such as Tripadvisor, which serve our needs perfectly. Another development is the growth of “augmented reality”, where information can be superimposed on what you can see via glasses. All this offers us the chance to provide new services.

”Social media: important messages carried in engaging stories for our communities.”

Katrin Schmitt, ST Social Media Marketing Manager

## Facts and figures.

France	2012
Overnights in 2012	1,318,460
Change compared with 2011	-5.4 %
Media reports generated	607
Visits to MySwitzerland.com	1.55 m*
Advertising & marketing contacts	493.3 m
Media Contacts	580,603,933
High-value customer contacts	150,088

\* Including impulse programme

## Focus on France.

France is the no.3 European market for the Swiss tourism industry. In 2012, however, the gap separating it from the leaders (Germany and the UK) narrowed significantly.

Of all Switzerland's neighbouring markets, France has resisted the economic crisis best. Convenient TGV rail connections play an important role – as does Club Med's investment in Switzerland, which has immediately led to a rise in the number of French visitors. The low-cost airline Vueling has a new direct flight Paris–Zürich, and SWISS has added Nice–Geneva. French visitors love Swiss cities, and are especially interested in cultural events. When looking at what Switzerland has to offer, they also tend to make comparisons with their own alpine resorts, rather than those of other countries.



From left: Olympic champions Camille Muffat and Yannick Agnel with their coach, Fabrice Pellerin.

### Two questions to Michel Ferla.

Vice President, Director Europe West:

#### How is the way the French book their travel changing?

Online bookings are becoming more and more important: 42 % of travellers booked online in 2011, in other words 12.5 million French people out of the 29.6 million who travelled\*.

#### Is there a key website for Switzerland?

With a turnover of €3.2 billion in 2011, voyage-sncf.com is France's most important commercial tourism website. It lists the majority of Swiss hotels, and more than 50% of TGV tickets to Switzerland are bought there.

\* Trips in France and abroad. Sources: Raffour Interactif, SNCF

### On an Olympic mission.

The French swimming champions Camille Muffat and Yannick Agnel spent several months in Ticino preparing for the London Olympics. ST succeeded in winning over the pair as ambassadors for the year's special theme "Switzerland – Land of Water", accompanying them on a three-day trip through Switzerland.

Along the way they visited the Lake Geneva Region, the Jungfrau Region and Vals in Graubünden. Several French TV channels and newspapers filed reports, achieving a total of 307 million contacts. The two athletes' Swiss stay paid off: they scooped three Olympic gold medals in London.

## Facts and figures.

Australia (incl. New Zealand and Oceania)	2012
Overnights 2012	284,710
Overnights 2002	178,274
Growth in overnights (2002–2012)	+59.7 %
Opening of the ST office in Sydney	2010
Advertising and marketing contacts	20.05 m
Media contacts	20.54 m
Media reports generated	151

## Focus on Australia.

**Australians' appetite for travel, plus Switzerland's growing profile "down under", are producing constant growth in the number of overnights. ST has boosted its presence locally.**

Following the opening of ST's office in Sydney in 2010 and the boosting of the team in 2012, ST has succeeded in raising Switzerland's profile in Australia. Media coverage has increased, and the range of Swiss trips offered by tour operators has expanded. The number of overnights increased in 2012 by 5.2 % compared with the previous year. Studies have shown that more and more Australians prefer to spend their holidays abroad. As Australia itself is an expensive travel destination, many Australians are not as price-sensitive as visitors from other countries – offering a great opportunity for Switzerland.



**”Switzerland Plus Packages are very popular with Australians.”**

Evelyn Lafone, Market Manager ST Australia

### **“Mountains, snow and Heidi.”**

Two questions to Evelyn Lafone, Market Manager ST Australia:

#### **What image do Australians have of Switzerland?**

A very positive one! Many Australians associate Switzerland with stereotypes of mountains, snow, Heidi, cheese and chocolate.

#### **Which offers can ST use to target visitors from Australia?**

So-called “Switzerland Plus Packages” are very popular with Australians. These are multi-day tours in Switzerland that visitors can build into a European trip. Among the favourite options are city sightseeing visits, rides on scenic railways, bike tours, hikes and family offers.

### **Get swissed.**

A promotional drive called “Why you should get swissed in Switzerland.” offered Australian travel agents the chance to win a trip to Switzerland.

To enter, participants had to make a video showing what they liked about Switzerland. ST picked 35 winners, and took them on a week-long trip to Switzerland. The campaign also included roadshows around Australia for travel agents, media reports in print and online and interactive coverage in social media. Within four months, the drive generated 250,000 media contacts. Swiss Travel System, SWISS and five regional partners also appeared at the roadshows.

# Award-winning work.

## Consistent application and a commitment to quality won ST important prizes.

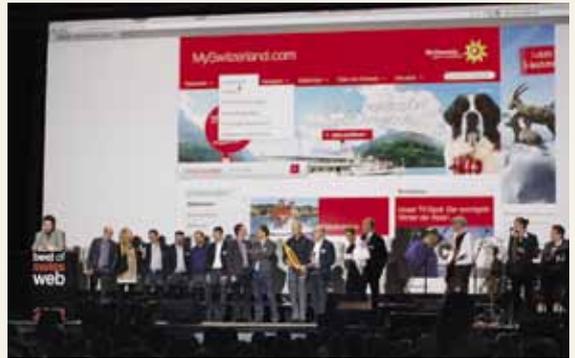
In 2012, ST's work was once again honoured with many prestigious prizes. The "ants" advert alone scooped a host of awards. Expert juries of interna-

tional tourism competitions agreed that ST also does a first-class job in its day-to-day work. ST won special praise for the quality of its media mailings, its efficient response to journalists' requests and its organisation of media conferences, among other strengths.

Left (from left to right): Oscar-winner Xavier Koller, ad director, Peter Brönnimann, Creative Director of Leo Burnett Switzerland, Martin Horat, "weather prophet", Nicole Diermeier, ST Head of Marketing.



Right: Prize-giving and eulogy at the "Best of Swiss Web" awards with jury chairman Prof. Dr. Reinhard Riedl (far left).



### Five major prizes for creativity.

Britain's D&AD awards are regarded as the ultimate international measure of creative excellence. Winner in the top category was ST's "ants" ad – as it was in many European competitions. In Switzerland the ad won a golden "Edi", and it impressed the Art Directors Club, which awarded it silver. ADC also awarded bronze to ST's "Cities" ad and "Holidays without Internet" campaign.

### ST website wins multiple awards.

At the "Best of Swiss Web" awards, MySwitzerland.com won gold in the Public Affairs category and silver in the categories Usability and Online Marketing. For its "Holidays without Internet" campaign, the site won another silver and two bronzes. In addition, MySwitzerland.com won the World Travel Award in the category World's Leading Travel Destination Website 2012.



Kristin Arntz, producer, Storyline Production.

### US "TV Oscar" for Switzerland.

ST and Engadin St. Moritz received a coveted Emmy Award in Los Angeles for the second time in a row. The winner was the NBC programme "Travel Cafe – St. Moritz".



Natalia Sizova, ST Russia (left) and Vladimir Pozhidaev, CEO of Senator Company.

### Russian honour for MICE department.

The Russian Chamber of Commerce, Business Travel magazine and the website Conference.ru present the Russian Business Travel & MICE Award every year. In 2012 it went to ST.

### Best tourist office in Germany.

For the ninth time, no less, Germany's travel journalists have decided that Switzerland leads the field: at ITB Berlin, ST Germany was voted Best Tourist Office 2012.

### Winning ways with words.

The travel trade organisation ANTOR Canada honoured the journalist Anne-Marie Parent for her report entitled "La Suisse en train", based on an ST media trip.



Aletsch Glacier in front of the Jungfrau, Valais

## Outlook.

”The greatest challenge for Swiss tourism and ST in 2013: stabilising German overnights and leading them back to growth.”

Jürg Schmid, CEO ST

### A decisive year for the German market.

Even though the number of overnights in Switzerland by German tourists has fallen by nearly 23.3% since the beginning of the euro crisis, this market has lost none of its importance: nearly one in five of all foreign tourists to Switzerland come from Germany.

The main challenge for ST and its partners is to bring about a return to sustainable growth of the number of overnights by German visitors and by Europeans in general. The creativity shown by Swiss destinations and service providers in the face of the euro crisis, together with the first signs of stabilisation in the number of overnights by European tourists in winter 2012–13, give us confidence that we will be able to succeed in this difficult task.

### A summer discovering Switzerland’s living traditions.

In the CBI\* 2012–13, Switzerland stands at the head of world country rankings (3rd place) in terms of authenticity. Living traditions and exceptional landscapes embody the tourist brand of Switzerland and its uniqueness. In summer 2013, ST and its partners invite visitors to discover Switzerland’s magnificent natural scenery, and to witness and take part in the living traditions that are cultivated enthusiastically throughout the country – a sure path to unforgettable encounters.

\*Country Brand Index 2012–13, FutureBrand



Figures and names.



- 48 Board of Directors.
- 49 Executive Board.
- 50 International Marketing Management Team (MMT).
- 50 Switzerland Tourism Council.
- 52 Balance Sheet 2012.
- 54 Profit and Loss Account 2012.
- 56 Notes to 2012 Financial Statements.
- 57 Report of the Statutory Auditors.

# Board of Directors.

**Jean-François Roth**

President Switzerland Tourism,  
President Switzerland's French-speaking  
Radio and TV (RTSR)

**Catherine Mühlemann**

Co-Owner of Andmann Media Holding  
GmbH, Media Entrepreneur and Executive  
Board Member

**Peter Vollmer, Dr.**

Vice President Switzerland Tourism

**Jeannine Pilloud**

Head of Passenger Traffic Division Swiss  
Federal Railways SBB  
Member of the Management Board

**Isabelle Aubert**

General Site Manager EPFL, Ecole Poly-  
technique Fédérale de Lausanne (EPFL)  
† 23.11.2012

**Casimir Platzter**

Board of Directors GastroSuisse,  
Vice President International  
Hotel & Restaurant Association

**Guglielmo L. Brentel**

President hotelleriesuisse, hotelier

**Marco Solari**

President Ticino Turismo,  
President International Film Festival  
Locarno

**Jean-Michel Cina**

Minister of Economy, Energy and Spatial  
Development, Canton of Valais

**Urs W. Studer**

Ex Mayor of Lucerne

**Peter Keller, Prof. Hon.**

Business and Economic Faculty (HEC),  
University of Lausanne

**Hansjörg Trachsel**

Member of the Government Council (GR),  
Head of Department of Economy and Social  
Services, Canton of Graubünden

**Paul Kurrus**

President AEROSUISSE

**In memory of Isabelle Aubert**

On 23 November 2012, Isabelle Aubert died at the age of 43. She was a member of Switzerland Tourism's board of directors from December 2007 to November 2012. She was also General Site Manager at the École Polytechnique Fédérale in Lausanne (EPFL) for four years, and before that General Manager at the Centre International de Conférences in Geneva (CICG) for five years. Switzerland Tourism's board of directors and members of staff are deeply saddened by her loss, and cherish her memory.

# Executive Board.



**Jürg Schmid**  
CEO



**Rafael Enzler**  
Marketing Production,  
Brand Management & Sponsorships  
Leaving as at 30.11.2012



**Urs Eberhard**  
Executive Vice President,  
Director Markets & Meetings



**Marc Isenring**  
Finances, Controlling,  
Human Resources, Infrastructure & IT



**Michel Ferla**  
Executive Vice President,  
Director Europe West



**Martin Nydegger**  
Business Development



**Daniela Bär**  
International Media & Corporate  
Communication



**Thomas Winkler**  
Portal Management & eMarketing



**Nicole Diermeier**  
Marketing

# International Marketing Management Team (MMT).

The MMT guarantees the integration of the markets and of relevant departments into the strategic planning of the worldwide tourism marketing.

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**Barbra Steuri-Albrecht**

Head of product marketing Meetings & Incentives

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**Simon Bosshart**

Director Asia-Pacific

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**Corinne Genoud**

Country Manager Netherlands

---

**Alex Herrmann**

Director Americas

---

**Dominic Keller**

Country Manager Switzerland

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**Werner Kehrl**

Head "Fairs & Events"

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**Jörg Krebs**

Director IMEA (India, Middle East, Africa)

---

**Marcelline Kuonen**

Country Manager United Kingdom & Ireland

---

**Christina Marzluff**

Director Central & Eastern Europe

---

**Tiziano Pelli**

Country Manager Italy

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**Federico Sommaruga**

Director Emerging Markets & Special Projects

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## Switzerland Tourism Council.

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**Hans Amacker**

CEO Rhaetian Railway

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**Kathrin Amacker, Dr**

Head of Group Communications Swisscom

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**Isabelle Aubert**

General Site Manager EPFL,  
Ecole Polytechnique Fédérale de Lausanne (EPFL)  
† 23.11.2012

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**Guglielmo L. Brentel**

Board of Directors Switzerland Tourism,  
President hotelleriesuisse, hotelier

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**Manu Broccard**

Director Swiss School of Tourism EST // University of Applied  
Sciences Western Switzerland

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**Aymo Brunetti, Prof. Dr**

Head of the Center for Regional Economic Development  
(CRED), University of Bern

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**Martin Bütikofer**

Director Swiss Museum of Transport

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**Bernhard Christen**

Head of Corp. Brand & Communication Management, Ricola AG

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**Hans-Ruedi Christen**

CEO Chocolat Frey AG

---

**Jean-Michel Cina**

Board of Directors Switzerland Tourism, Minister of Economy,  
Energy and Spatial Development, Canton of Valais

---

**Robert Deillon**

CEO Geneva International Airport

---

**David Escher, Dr**

CEO Switzerland Cheese Marketing AG

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**Elia Frapolli**

Director Ticino Turismo

---

**Fredi Gmür**

CEO Swiss Youth Hostels, President Non-hotel  
accommodation Switzerland

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**Christoph Juen, Dr**

CEO hotelleriesuisse

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**Richard Kämpf**

Head of Tourism Affairs, State Secretariat for Economic Affairs  
SECO

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# Switzerland Tourism Council.

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**Heinz Karrer**

CEO Axpö

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**Peter Keller, Prof. Hon.**

Board of Directors Switzerland Tourism, Business and Economic Faculty (HEC), University of Lausanne

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**Thomas E. Kern**

CEO Flughafen Zürich AG

---

**Paul Kurrus**

President AEROSUISSE

---

**Bernhard Kuster, Dr**

Director GastroSuisse

---

**Christian Laesser, Prof. Dr**

Director Institute for Systemic Management and Public Governance, Research Center Tourism and Transport, University of St. Gallen

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**Pius Landolt**

Delegate of the Mayor's Office, City of Zürich

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**Sven Lareida**

Head of Partnership Marketing, Swiss International Air Lines Ltd.

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**Mario Lütolf**

Managing Director Swiss Tourism Federation (STV-FST)

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**Michael Maeder**

CEO STC Switzerland Travel Centre AG

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**Andreas Meyer**

CEO Swiss Federal Railways SBB

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**Catherine Mühlemann**

Board of Directors Switzerland Tourism,  
Co-Owner of Andmann Media Holding GmbH,  
Media Entrepreneur and Executive Board Member

---

**Peter Niederhauser**

CEO Hallwag Kümmerly + Frey AG

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**Beat Niedermann**

Director, Corporate & Institutional Clients, UBS AG

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**Casimir Platzer**

Board of Directors GastroSuisse,  
Vice President International  
Hotel & Restaurant Association

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**Jeannine Pilloud**

Head of Passenger Traffic Division Swiss Federal Railways SBB  
Member of the Management Board

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**Ernst Risch**

Managing Director Liechtenstein Tourism

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**Jean-François Roth**

President Switzerland Tourism, President Switzerland's  
French-speaking Radio and TV (RTSR)

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**Carlos Sardinha**

Managing Director Europcar AMAG Services AG

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**Bruno Sauter**

Deputy Minister of the Department for Economy and Labour,  
Canton of Zürich

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**Rolf Schafroth**

CEO Global Travel Services Division,  
Member of the Executive Board, Kuoni Travel Holding Ltd.

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**Marco Solari**

Board of Directors Switzerland Tourism, President Ticino  
Turismo, President International Film Festival Locarno

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**Ueli Stüchelberger**

Director Public Transport Association and Swiss Cableways

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**Urs W. Studer**

Board of Directors Switzerland Tourism, ex Mayor of Lucerne

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**Hansjörg Trachsel**

Board of Directors Switzerland Tourism, Member of the  
Government Council (GR), Head of Department of Economy  
and Social Services, Canton of Graubünden

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**Martin Tritten**

Head of Tourism Department, beco Bernese Economy,  
Department of Economy, Canton of Bern

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**Peter Vollmer, Dr**

Vice President Switzerland Tourism

---

**Hans-Martin Wahlen**

Delegate of the Board of Directors / CEO Kambly SA

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**Andreas Willich**

Head of passenger traffic BLS AG

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**Guido Zumbühl**

CEO Bucherer AG

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# Balance Sheet 2012.

1. Assets.		Balance sheet 31.12.2012 CHF	Balance sheet 31.12.2011 CHF
<b>Current assets</b>			
1.1	Liquid assets		
	Cash on hand	42 464.44	58 094.01
	Postal accounts	357 750.11	300 315.74
	Bank accounts	13 129 018.98	14 465 493.07
	<b>Total liquid assets</b>	<b>13 529 233.53</b>	<b>14 823 902.82</b>
1.2	Accounts receivable		
1.2.1	Receivables from sale of goods and services	2 603 075.56	3 439 339.06
1.2.2	Other short-term accounts receivable		
	Guarantee obligations, advances, prepayments	57 719.57	61 282.44
	Public institutions	475 961.95	505 692.53
	Others	1 203 339.57	1 343 864.72
	Bad debt provision	-157 000.00	-192 000.00
	<b>Total accounts receivable</b>	<b>4 183 096.65</b>	<b>5 158 178.75</b>
1.3	Stock and work in progress		
	Stock and work in progress	225 537.40	209 148.63
	<b>Total stock and work in progress</b>	<b>225 537.40</b>	<b>209 148.63</b>
1.4	Prepaid expenses		
	Accruals and deferrals, federal contribution to impulse programme 2012/13	1 582 638.23	0.00
	Prepaid expenses	1 782 452.50	705 389.58
	<b>Total prepaid expenses</b>	<b>3 365 090.73</b>	<b>705 389.58</b>
	<b>Total current assets</b>	<b>21 302 958.31</b>	<b>20 896 619.78</b>
<b>Fixed assets</b>			
1.5	Financial assets		
	Participations	1 226 504.00	1 762 504.00
	Long-term receivables to third parties	413 402.15	345 623.84
	<b>Total financial assets</b>	<b>1 639 906.15</b>	<b>2 108 127.84</b>
1.6	Tangible assets		
	Office equipment, office machinery	400 324.84	313 971.24
	IT equipment	281 262.65	252 879.60
	Infrastructure for presentations	622 710.37	888 171.73
	<b>Total tangible assets</b>	<b>1 304 297.86</b>	<b>1 455 022.57</b>
1.7	Fixed assets real estate		
	Real estate	7 341 034.11	7 549 159.11
	<b>Total fixed assets real estate</b>	<b>7 341 034.11</b>	<b>7 549 159.11</b>
	<b>Total fixed assets</b>	<b>10 285 238.12</b>	<b>11 112 309.52</b>
<b>Total assets</b>		<b>31 588 196.43</b>	<b>32 008 929.30</b>

# Balance Sheet 2012.

2. Liabilities and owners' equity.		Balance sheet 31.12.2012 CHF	Balance sheet 31.12.2011 CHF
<b>Liabilities</b>			
2.1	Short-term liabilities		
2.1.1	Short-term liabilities/accounts payable	7 432 530.46	6 687 789.29
2.1.2	Other short-term liabilities		
	Public institutions	691 046.77	816 660.96
	Third parties	1 941 856.13	2 564 262.28
	Pension funds	259 625.61	240 572.49
	<b>Total short-term liabilities</b>	<b>10 325 058.97</b>	<b>10 309 285.02</b>
2.2	Deferred credits to income/short-term provisions		
	Deferred credits to income	1 082 645.77	1 828 127.12
	Personnel provisions	1 219 793.06	1 144 055.06
	Federal impulse contribution provision 2011/12	0.00	2 260 000.00
	Marketing activities, following year	5 241 681.00	4 172 947.00
	<b>Total deferred credits to income/short-term provisions</b>	<b>7 544 119.83</b>	<b>9 405 129.18</b>
2.3	Long-term liabilities		
2.3.1	Long-term financial liabilities		
	Third parties	0.00	0.00
2.3.2	Long-term provisions		
	IT equipment	312 100.00	312 100.00
	Renovation of real estate Paris	200 000.00	200 000.00
	Conversion of rented premises/chattels	509 900.00	509 900.00
	Others	1 859 637.05	1 962 058.04
	Extraordinary events Destination Switzerland	4 453 200.00	3 253 200.00
	Reserve for staff terminations	877 743.76	833 975.37
2.3.3	Unrelated liabilities		
	Real estate Paris	3 926 865.45	3 678 785.69
	<b>Total long-term liabilities</b>	<b>12 139 446.26</b>	<b>10 750 019.10</b>
	<b>Total liabilities</b>	<b>30 008 625.06</b>	<b>30 464 433.30</b>
<b>Owners' equity</b>			
2.4	Capital as of 1.1.2012/2011	1 544 496.00	1 498 498.47
	Reduced expenditure	35 075.37	45 997.53
	<b>Total owners' equity</b>	<b>1 579 571.37</b>	<b>1 544 496.00</b>
<b>Total liabilities and owners' equity</b>		<b>31 588 196.43</b>	<b>32 008 929.30</b>

# Profit and Loss Account 2012.

3. Income.		Budget 2012 CHF	Account 2012 CHF	Account 2011 CHF
<b>Operating income</b>				
3.1	Members' contributions			
	Swiss Confederation	51 443 000	51 442 600.00	47 043 800.00
	Federal contribution to impulse programme 2011/2012	0.00	2 260 000.00	9 740 000.00
	Federal contribution to impulse programme 2012, summer share	8 325 000	8 325 000.00	0.00
	Federal contribution to impulse programme 2012, winter share	0.00	1 582 638.23	0.00
	Switzerland Tourism Council	967 500	905 000.00	905 000.00
	Other members (cantons, communities, other tourism contributors, commerce interests, firms, organisations)	1 300 000	1 460 180.00	1 467 140.00
	Voluntary contributions	0.00	0.00	410.00
	<b>Total members' contributions</b>	<b>62 035 500</b>	<b>65 975 418.23</b>	<b>59 156 350.00</b>
3.2	Miscellaneous income	100 000	199 402.11	322 149.35
3.3	Financial income	29 488	223 016.31	474 879.78
3.4	Expenses charged to third parties			
	Income from personnel expenses charged to third parties	1 080 200	1 030 838.12	1 104 708.29
	Income from operating expenses charged to third parties	268 602	293 542.49	263 437.60
	<b>Total expenses charged to third parties</b>	<b>1 348 802</b>	<b>1 324 380.61</b>	<b>1 368 145.89</b>
	<b>Total operating income</b>	<b>63 513 790</b>	<b>67 722 217.26</b>	<b>61 321 525.02</b>
<b>Marketing income</b>				
3.5	Sponsorship marketing	8 962 000	9 437 330.99	7 985 180.34
3.6	Marketing income impulse programme	810 000	924 712.14	2 105 980.01
3.7	Other marketing income	25 000 000	24 731 539.48	24 383 002.84
	<b>Total marketing income</b>	<b>34 772 000</b>	<b>35 093 582.61</b>	<b>34 474 163.19</b>
<b>Extraordinary and third party income</b>				
3.8	Extraordinary and third party income	0.00	0.00	0.00
3.9	Income from assets	0.00	0.00	0.00
3.10	Third party income real estate	1 114 958	1 237 599.13	1 311 766.94
	<b>Total extraordinary and third party income</b>	<b>1 114 958</b>	<b>1 237 599.13</b>	<b>1 311 766.94</b>
3.11	Additional expenditure/funds	0.00	0.00	0.00
<b>Total income</b>		<b>99 400 748</b>	<b>104 053 399.00</b>	<b>97 107 455.15</b>

# Profit and Loss Account 2012.

4. Expenses.		Budget 2012 CHF	Account 2012 CHF	Account 2011 CHF
<b>Marketing expenses</b>				
4.1	Expenses from marketing	59 582 000	58 943 121.04	55 230 449.72
4.2	Expenses from marketing impulse programme	9 135 000	13 092 350.37	11 845 980.01
	<b>Total expenses from marketing</b>	<b>68 717 000</b>	<b>72 035 471.41</b>	<b>67 076 429.73</b>
4.3	Personnel expenses for marketing			
	Salaries	18 151 107	18 739 738.37	17 830 221.98
	Social security	3 552 443	3 534 817.95	3 387 057.88
	<b>Total personnel expenses for marketing</b>	<b>21 703 550</b>	<b>22 274 556.32</b>	<b>21 217 279.86</b>
	<b>Total marketing expenses</b>	<b>90 420 550</b>	<b>94 310 027.73</b>	<b>88 293 709.59</b>
<b>Operating expenses</b>				
4.4	Personnel expenses – operational			
	Salaries	1 661 000	1 750 957.00	1 680 780.00
	Social security	345 000	356 247.00	340 607.00
	<b>Total personnel expenses – operational</b>	<b>2 006 000</b>	<b>2 107 204.00</b>	<b>2 021 387.00</b>
4.5	Secondary personnel costs			
	Staff training and continuing education	300 000	241 450.37	215 338.48
	Transfers and staff recruiting	250 000	257 611.23	226 783.73
	Vacation/overtime not yet compensated (adjustment)	0.00	87 638.00	33 228.00
	Travel and representation expenses	310 341	342 570.37	291 428.12
	Other personnel expenses	172 323	210 010.69	226 884.76
	<b>Total secondary personnel costs</b>	<b>1 032 664</b>	<b>1 139 280.66</b>	<b>993 663.09</b>
4.6	Other operating expenditure			
	Premises	2 839 826	2 926 670.80	2 819 763.92
	Administration	1 153 908	1 295 485.58	1 152 273.23
	Public bodies	220 840	225 224.34	180 620.75
	Other operating expenditure	85 424	95 570.44	100 752.43
	<b>Total other operating expenditure</b>	<b>4 299 997</b>	<b>4 542 951.16</b>	<b>4 253 410.33</b>
4.7	Miscellaneous expenses inc. bad debt	10 000	-29 456.05	21 897.55
4.8	Financial expenses/costs of participation	79 656	557 339.95	24 577.34
4.9	Depreciation on tangible assets			
	IT equipment	409 000	293 585.65	279 661.20
	Office equipment, office machinery	147 000	238 064.79	211 288.04
	<b>Total depreciation on tangible assets</b>	<b>556 000</b>	<b>531 650.44</b>	<b>490 949.24</b>
	<b>Total operating expenses</b>	<b>7 984 317</b>	<b>8 848 970.16</b>	<b>7 805 884.55</b>
<b>Extraordinary and non-operating expenses</b>				
4.10	Extraordinary and non-operating expenses	0.00	0.00	0.00
4.11	Expenses third party real estate	995 881	859 325.74	961 863.48
	<b>Total extraordinary and non-operating expenses</b>	<b>995 881</b>	<b>859 325.74</b>	<b>961 863.48</b>
4.12	Reduced expenditure	0.00	35 075.37	45 997.53
<b>Total expenses</b>		<b>99 400 748</b>	<b>104 053 399.00</b>	<b>97 107 455.15</b>

# Notes to 2012 Financial Statements.

## Accounting principles

As a public corporation Switzerland Tourism maintains and presents its accounts in accordance with §957 ff. of the Swiss Code of Obligations (CO) and the applicable provisions of Swiss stock corporation law (§662a ff. CO). Switzerland Tourism is liable for its liabilities to the extent of its assets in accordance with §21 of the organisational charter.

## IKS risk assessment

Switzerland Tourism has updated and documented the company risk assessment in the framework of the existing risk management process. This covers all risks that could have a substantial influence on the assessment of the financial statements. Risks are continually monitored and controlled with risk management procedures defined in the framework of the risk management process. The results of this monitoring and control can be seen in the Administration Manual and in the Internal Control System (IKS) folder.

	2012 CHF	2011 CHF
<b>Pension fund liabilities</b>		
Short-term liabilities towards domestic and foreign pension funds	260 000	241 000
<b>Fire insurance, tangible property</b>		
Chattels	2 200 000	2 200 000
Mailing house warehouse/trade fair stand	3 600 000	3 600 000
IT equipment	749 000	749 000
Property (Paris property)	p.M.	p.M.
<b>Assets pledged for own liabilities</b>		
UBS – credit line (current account)	2 000 000	2 000 000
CS – credit line (current account)	2 000 000	2 000 000
<b>Depreciation on tangible assets</b>		
Depreciation for infrastructure appearances (trade show stand and snow globe), web and mailing-house servers is included under “Expenses from marketing”.	329 082	369 860
<b>Beteiligungen</b>		
STC Switzerland Travel Centre AG Zürich/London – Share capital	5 250 000	5 250 000
ST holding	33 %	33 %
Swiss Travel System AG, Zürich – Share capital	300 000	300 000
ST holding	10 %	10 %
<b>Accounts receivable/payable vis-à-vis STC Switzerland Travel Centre AG</b>		
The balance sheet contains the following credit/liability items:		
1.2.1 Debtors	4 542	0
2.1.1 Creditors	91 607	48 864
<b>Paris property account</b>		
Income	1 237 599	1 311 767
Expenditure	859 326	961 863
of which buildings depreciation	208 000	208 000
Profit	378 273	349 904
<b>Leasing liabilities</b>		
Total leasing liabilities	33 144	32 229
<b>Amortisation of undisclosed reserves</b>		
Net amortisation of undisclosed reserves for the fiscal year	0	2 204 548
<b>Off-balance-sheet transactions</b>		
Positive replacement cost of forward foreign exchange contracts	43 750	672 158
Negative replacement cost of forward foreign exchange contracts	-435 477	-21 716
Contract volume	28 524 061	32 737 544
Forward foreign exchange contracts involve the hedging of budgeted expenditure for the following year in foreign currency (EUR, USD, GBP, JPY, AED, AUD, RUB).		
<b>Tokyo deposit</b>		
Rental guarantee for nine months' rental of office in Tokyo JPY 12 258 000	0	148 971

## Deviations from principles according to §662a par. 3 CO

For the sake of greater transparency, the presentation and breakdown of the balance sheet and of the profit and loss accounts for the reporting period and the preceding year have been adjusted (member contributions).

# The auditors.

## Chairman

### Daniel Anliker

Partner, Audit expert  
PricewaterhouseCoopers AG, Zürich

## Members

### Patrick Balkanyi

Partner, Audit expert  
PricewaterhouseCoopers AG, Zürich

### Daniel Ketterer

Partner, Audit expert  
PricewaterhouseCoopers AG, Zürich

## Alternate members

### Gerhard Siegrist

Partner, Audit expert  
PricewaterhouseCoopers AG, Zürich

### Roger Kunz

Partner, Audit expert  
PricewaterhouseCoopers AG, Zürich

## Report of the Statutory Auditors.

### Report of the statutory auditor on the financial statements

As statutory auditor, we have audited the financial statements of Switzerland Tourism, which comprise the balance sheet, income statement and notes (pages 52 to 56), for the year ended 31 December 2012.

### Board of Directors' responsibility

The Board of Directors is responsible for the preparation of the financial statements in accordance with the requirements of Swiss law and the company's articles of incorporation. This responsibility includes designing, implementing and maintaining an internal control system relevant to the preparation of financial statements that are free from material misstatement, whether due to fraud or error. The Board of Directors is further responsible for selecting and applying appropriate accounting policies and making accounting estimates that are reasonable in the circumstances.

### Auditor's responsibility

Our responsibility is to express an opinion on these financial statements based on our audit. Our assessment is based on the comprehensive audit carried out by PricewaterhouseCoopers AG and their report as delivered to the auditors. Their audit was conducted in accordance with Swiss law and Swiss Auditing Standards. Those standards require that an audit is planned and performed to obtain reasonable assurance whether

the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers the internal control system relevant to the entity's preparation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control system. An audit also includes evaluating the appropriateness of the accounting policies used and the reasonableness of accounting estimates made, as well as evaluating the overall presentation of the financial statements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

### Opinion

In our opinion, the financial statements for the year ended 31 December 2012 comply with Swiss law and the company's articles of incorporation.

### Report on other legal requirements

We confirm that we meet the legal requirements on licensing according to the

Auditor Oversight Act (AOA) and independence (article 69b paragraph 3 CC in connection with article 728 CO) and that there are no circumstances incompatible with our independence.

In accordance with article 69b paragraph 3 CC in connection with article 728a paragraph 1 item 3 CO and Swiss Auditing Standard 890, we confirm that an internal control system exists which has been designed for the preparation of financial statements according to the instructions of the Board of Directors.

We recommend that the financial statements submitted to you be approved.

## The auditors

### Daniel Anliker

Audit expert  
Chief auditor

### Patrick Balkanyi

Audit expert  
Member

### Daniel Ketterer

Audit expert  
Member

Zürich, 14 March 2013



Zürichhorn, Zürich

**A commitment to sustainability**

Switzerland Tourism knows that nature is our most precious resource, and is committed to principles of sustainability. Both at its headquarters and at events, it applies environmental standards laid out in ISO 14001 and ISO 9001. These cover areas such as the environmental impact of the workplace, energy use, waste management and use of paper and printers.

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