

Marketing strategy

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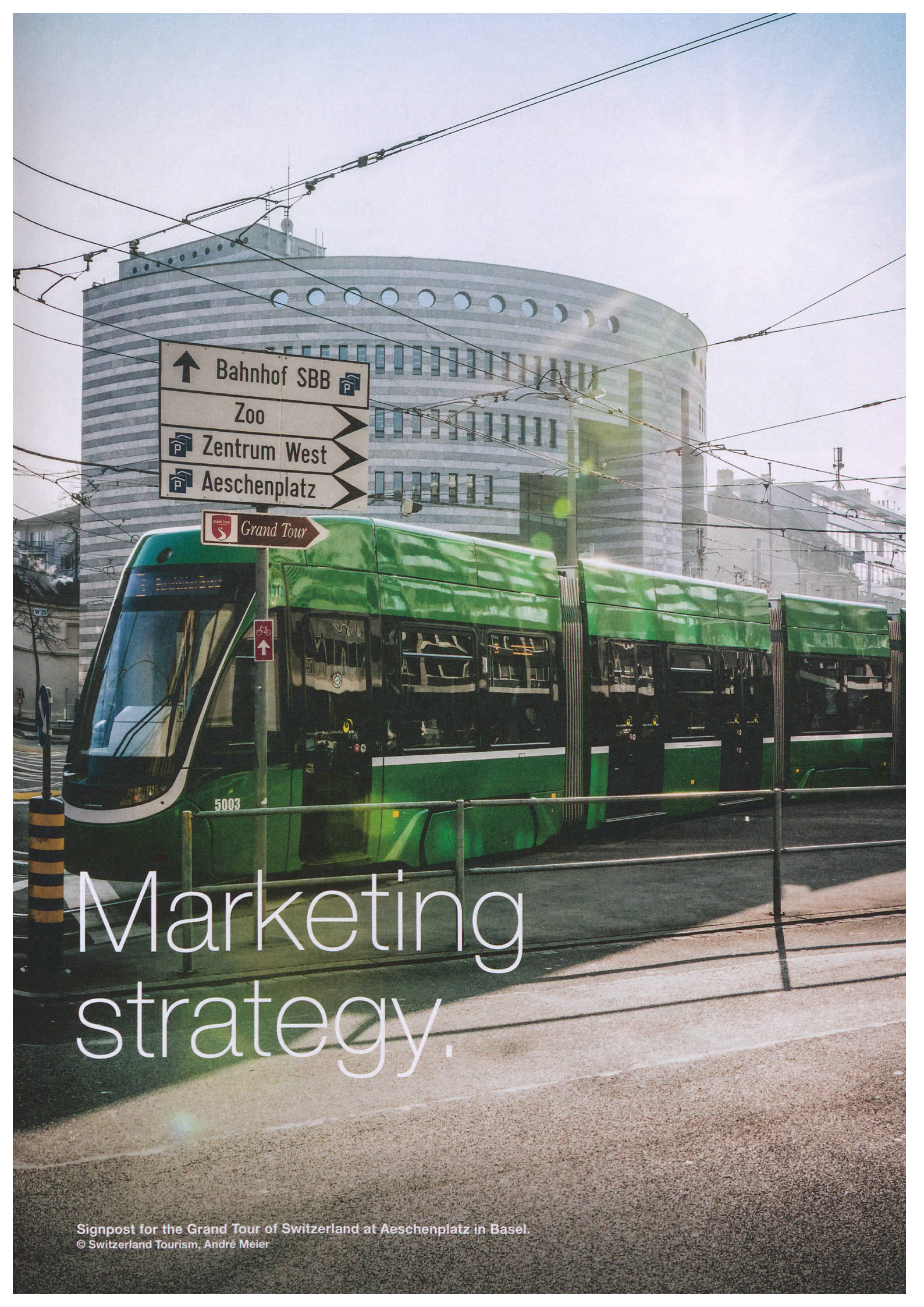
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Marketing strategy.

Signpost for the Grand Tour of Switzerland at Aeschenplatz in Basel.
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The four pillars of marketing.



The TV ad for the Winter campaign 16/17: Bruno is #INLOVEWITHSWITZERLAND, because you can but you don't have to.

Promotion.

ST still stimulates the desire to travel to Switzerland using classic advertising means. The mix ranges from brochures, special offers, to videos and TV spots with a touch of humour, such as the "Bruno" ad.

Example TV ad: Thrill & chill with Bruno.

ST's humorous TV ads have become a tradition and are enormously popular, particularly on YouTube. In the ad for the Winter campaign 16/17, Bruno takes up the trend for selfies. Always relaxed, he has a double perform wild stunts through the dreamy winter landscape and quickly becomes a social media hero. By the end of the year, three million users had seen the ad on YouTube, and the message got through: Switzerland is the home of snow sports for both casual and active winter athletes.

Facts and figures.

Promotion	2016	2015
Advertising & marketing contacts*	bn 6.25	4.99
Brochures distributed**	m 29.29	34.06
High-value customer contacts***	m 6.34	5.49

*Contacts resulting from paid advertising (banners, posters, TV ads, events, etc.)

** Proactive distribution of advertising material (inserts, flyers, etc.)

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

Digital marketing.

MySwitzerland.com is, according to Alexa ranking, one of the world's most popular destination websites. This online presence is complemented by ST's own apps and social media channels.

Example web: A new web visits record.

The Alexa ranking of websites measures visitor numbers and is one of the most significant indicators of online success. Alexa Internet Inc. is a subsidiary of Amazon. In this ranking, MySwitzerland.com was at the top end of national tourism and destination websites. This huge popularity is also confirmed by our own numbers: ST registered over 30 million visits in 2016 – an absolute record, which can be attributed both to our efforts in search engine optimisation and relevance of content.

Facts and figures.

Digital marketing	2016	2015
Web visits per day*	82,650	73,500
Web visits per year*	m 30.17	26.83
Languages	16	16
Hotels	2,263	2,353
Holiday apartments	21,703	22,667
E-CRM partners	31	30
Newsletter subscribers	876,000	796,000
Newsletters sent	m 15.52	8.68
Mobile app downloads	m 2.78	2.53
Social media contacts**	m 2.66	2.25

*WEMF-certified

** Number of followers on Facebook, Twitter, YouTube, Pinterest, Instagram, Tumblr, LinkedIn, Vine, Weibo, Ren Ren, Google+, WeChat



MySwitzerland.com set a new record, with over 30 million visits.

Key Media Management (KMM).

Thanks to target-group oriented media relations, Switzerland as a holiday destination was represented in newspapers, radio and TV all over the world. Trips and conferences kept the media's interest continually piqued.

Example press trips:

The Grand Tour on a Harley.

The Grand Tour of Switzerland is the Swiss answer to the global tourism trend for touring. In 2015 the Grand Tour was introduced to a broad audience. In 2016, ST targeted specialist journalists in order to reach specific interest groups and new visitor segments. In Poland, for instance, ST teamed up with Harley-Davidson to invite Polish motoring journalists for a Grand Tour on the newest models. Their reports generated around 1 million media contacts.

Facts and figures.

Key Media Management		2016	2015
Media contacts	bn	10.76	11.09
Media reports generated		16,218	15,612
Participants on ST media trips		2,115	2,100
Media conferences		115	98
Top media results*		2,196	1,900

*Positive media reports with prominent placing, images and tourist content, which appear in a key medium



Polish journalists discover the Grand Tour of Switzerland on Harley-Davidsons – with a stopover in Brunnen, Schwyz.



The new concept of the STE Brazil has been very well received by tourism partners.

Key Account Management (KAM).

In long-haul markets, Swiss holidays are predominantly booked through specialist travel agencies. ST's training of their employees has paid off.

Example travel agencies:

New STE concept in Brazil.

With a new concept, ST Brazil has been able to further improve the efficiency of the travel industry event Switzerland Travel Experience (STE). To this end, 186 tour operator representatives were invited in three groups to a resort near São Paulo for 24 hours. The focus was on exchanging ideas, with workshops held by key players in Swiss tourism. The new concept generated 3,700 additional overnights and the feedback from both TOs and partners was very positive. "I've just experienced an absolutely first-class STE Brazil. They've solved a complex task brilliantly," said Markus Lergier, director of Bern Tourism.

Facts and figures.

Key Account Management		2016	2015
KAM-generated overnights	m	4.70	4.81
Tourism turnover*	CHF bn	1.13	1.17

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

Segment and experiential strategy.

Targeted visitor marketing.

More and more visitors want to learn, discover and experience unique moments when travelling. To meet their needs, in 2016 ST began to adopt a marketing strategy which focuses on clearly defined visitor categories to offer them the appropriate experiences.

As a holiday destination, Switzerland must have the ambition to be "Best in Class", differentiating itself with surprising, unique, high-quality experiences. Over the years we have also learned that price becomes less of an issue when travellers are looking for such precious moments.

In order to be able to promote and offer the right experience for individual markets and groups with an even greater accuracy, ST has identified ten segments in leisure tourism and three in business tourism (see graphic).

This division still distinguishes between our four main campaigns: Cities, Summer, Winter and Meetings. However, within these campaigns, we identify differ-

ent visitor segments and their clearly defined needs. Summer, for example, is the season of the "Nature Lover". Visitors in this segment want to break away from their everyday lives and recharge their batteries in nature, as well as get to know the local cultures. The "Outdoor Enthusiast", on the other hand, looks for a broad range of sporting opportunities in a picturesque natural environment.

Highlighting experiences

The most important criteria for success of the new strategy are experiences that are conveniently located, easily accessible and bookable. The new segment and experiential strategy is thus applied consistently in the complete four-wheel drive of ST's integrated marketing (Promotion, Digital Marketing, Key Media Management and Key Account Management). The experiences are prominently featured on both on- and offline platforms in the form of exciting stories.

Cities

-  City Breaker
-  Culture Traveller
-  Attractions Tourer
-  Lifestyle Traveller

Summer

-  Nature Lover
-  Outdoor Enthusiast
-  Attractions Tourer
-  Lifestyle Traveller
-  Spa & Vitality Guest
-  Family

Winter

-  Snow Lover
-  Snow Sports Enthusiast
-  Attractions Tourer
-  Lifestyle Traveller
-  Spa & Vitality Guest
-  Family

Meetings

-  Congress Organizer
-  Meeting Planner
-  Incentive Planner

Cities.

The best advertisement for Swiss cities.

City trips are fashionable. Cultural and artistic offers play a key role in urban tourism. ST is relying on its strong partners to communicate in this area.

ST is positioning Swiss cities as “Boutique Towns”, where attractive historic districts make the visitor feel comfortable and where world-class art can be enjoyed in a stress-free setting. To increase the awareness level of the artsy side of Swiss cities internationally, ST has sought cooperation with

specialist institutions – for example, the new “Art Museums of Switzerland” (AMoS) association, to which 11 of the most renowned Swiss museums belong. Efforts for the promotion of urban tourism have also been rewarded in India. After ST and Zurich Tourism persuaded the producers of the popular TV soap opera “Yeh Rishta Kya Kehlata Hai” of the city’s charms, several episodes of the show (67 million viewers) were filmed in the city, including in the historic quarter.

Facts and figures.

“Switzerland’s cities are boutique towns with attractive historic districts and a sense of well-being, inviting visitors to linger for longer. Visitors can enjoy world-class art and culture, yet also take in views of mountain peaks all around – all in one place.”

Segments



City Breaker
– Urban Lifestyle
Seeker
– Sightseer



Culture Traveller
– Culture Traveller



Attractions Tourer
– Attractions,
History &
Heritage Explorer
– Day Tripper



Lifestyle Traveller
– Luxury Traveller
– Gourmet

Cities	2016	2015
Budget	CHF m 10.7	9.5
Share of total budget	% 11.6	9.9
Target markets	BE, CH, DE, ES, FR, IT, UK, USA (with CA)	
Brochures distributed	m 5.7	10
Participants on ST media trips	722	777
Media conferences (home and abroad)	62	37
Media contacts (readers, viewers, listeners)	bn 2.98	3.32



ST assisted the 34-strong Indian film crew and their one ton of equipment on the journey through Switzerland – as here in Zurich.

Summer.

Victoria on the road to happiness.

The focus of 2016's Summer campaign was the Grand Tour of Switzerland: in a TV ad, the British "Lady Victoria" embarked on a journey with Maurice the dog and a motorcycle.

In ST's 2016 Summer campaign, "Lady Victoria" embarked on the Grand Tour to look for the reasons why the Swiss are the happiest people in the world. In addition to varied and breathtakingly

beautiful landscapes, she also experienced unforgettable personal moments, such as leaping into an emerald-green lake or having an impromptu lunch with the locals. The message: on the Grand Tour you can discover the happiness of the Swiss and be a part of it. In summer 2016, the Grand Tour generated over 290,000 additional overnights and reached a brand awareness of 43 % in only its second season.



In the 2016 Summer campaign, "Lady Victoria" and her dog, Maurice, experience beautiful moments on the Grand Tour.

Facts and figures.

"The Grand Tour of Switzerland combines Switzerland's highlights in one single journey."

Segments



Nature Lover

- Ecotourist
- Typically Swiss Romantic



Outdoor Enthusiast

- Hiker
- Biker & Cyclist



Attractions Tourer

- Attractions, History & Heritage Explorer
- Day Tripper



Lifestyle Traveller

- Luxury Traveller
- Gourmet



Spa & Vitality Guest

- Spa & Vitality Guest
- Well Ager



Family

- Family with Toddlers
- Family with Kids

Summer		2016	2015
Budget	CHF m	42.6	46.9
Share of total budget	%	46.4	48.8
Target markets	worldwide	worldwide	
Brochures distributed	m	18.0	19.0
Visits to MySwitzerland.com	m	15.2	13.3
Participants on ST media trips		878	842
Media contacts (readers, viewers, listeners)	bn	4.3	4.6
KAM-generated overnights	m	2.6	2.6

*Including Cities campaign content



An interactive journey through Switzerland as a touring destination in Paris.

360 degrees of Switzerland in Paris.

In the business Paris district of La Défense, ST invited passers-by on an interactive journey. The Grand Tour of Switzerland installation brought Switzerland as a touring destination to life, with a 360-degree experience spread over 700sq.m. Among other things, visitors could try on a virtual reality headset, which made it possible to suddenly be standing

amidst the Rhine Falls, or bungee jumping off the Verzasca Dam. The event was a massive success: over five days, 200,000 people saw the exhibition and 8,000 visitors actively participated in the virtual Switzerland journey. The accompanying media reports generated almost four million contacts.

Strong partnerships.

Switzerland was the official host nation of CMT Stuttgart, Germany's largest public fair for tourism and leisure, with 220,000 visitors. Making an appearance in the capital of Baden-Württemberg was no coincidence: the state accounts for 25 % of all German overnights in Switzerland, and so has special significance.

To win back price-sensitive German visitors, especially in the "Attractions Tourer" segment, ST combined forces for this event and was able to count on strong Swiss partners (46 destinations, regions and companies), with the Grand Tour as a particular focus. One of many highlights was a sneak preview of Little Mountain Boy – the film adaptation of the classic children's book "A Bell for Ursli". The Oscar-winning director Xavier Koller personally introduced his film.



Switzerland as host nation at CMT Stuttgart: (from left) Jürg Schmid, CEO Switzerland Tourism; Roland Bleinroth, CEO Messe Stuttgart; Christine Schraner Burgener, Swiss Ambassador to Germany; Dr. Nils Schmid, Minister of Finance and Economy for Baden-Württemberg.

Winter.

Swiss winter arrives in China.

35 % of Chinese skiers dream of skiing holidays abroad. At Asia's largest winter sport fair, ST promoted Switzerland as the "Home of Snowsports".

The Chinese government estimates that there will be 300 million Chinese winter sports enthusiasts by the time of the 2022 Beijing Winter Olympics. There are already around 560 ski domains in China, and a total of 12 million skier-days was recorded during the 2014–15 winter season. To make as many of them as possible dream of a holiday in

the "Home of Snowsports", ST (in conjunction with 22 partners) presented the Swiss winter at the first World Winter Sports Expo in Beijing, which was attended by around 100,000 visitors (individuals and tourism professionals). The interest was gratifying: ST representatives gave many well-attended keynote presentations on winter sports in Switzerland. The ST stand was awarded the prize for best presentation and 80 journalists attended the ST media conference.

*Source: "China Ski Industry White Book 2015/2016 International Report on Snow & Mountain Tourism", Laurent Vanat.



ST presents the Swiss winter at the first World Winter Sports Expo in Beijing.

Facts and figures.

"Switzerland is the original destination for snow-white, active winter experiences with the warmth of an open fire."

Segments

 Snow Lover – Winter Magic Romantic	 Snow Sports Enthusiast – Skier – Free Rider – Cross-country Skier
 Attractions Tourer – Attractions, History & Heritage Explorer – Day Tripper	 Lifestyle Traveller – Luxury Traveller – Gourmet
 Spa & Vitality Guest – Spa & Vitality Guest	 Family – Family with Toddlers – Family with Kids

Winter		2016	2015
Budget	CHF m	22.4	22.7
Share of total budget	%	24.4	23.6
Target markets	worldwide	worldwide	
Brochures distributed	m	5.4	5.0
Visits to MySwitzerland.com	m	14.9	13.5
Participants of ST media trips		555	481
Media contacts (readers, viewers, listeners)	bn	2.7	3.1
KAM-generated overnights	m	1.2	1.3

*Including Cities campaign content

Switzerland in the heart of Stockholm.

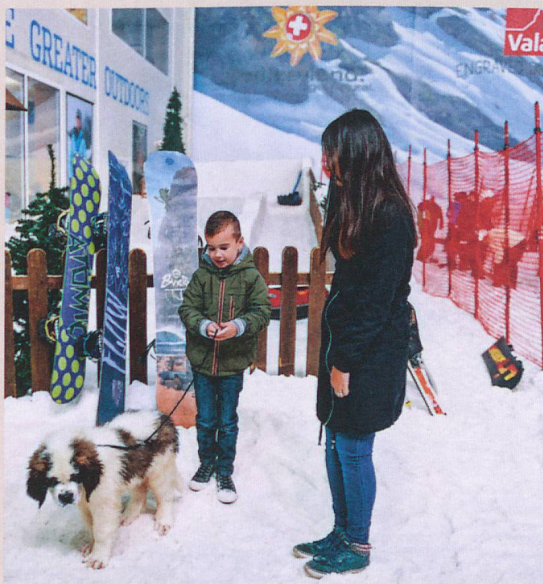
The NK store in Stockholm is one of Sweden's leading department stores. At the start of every winter season, it hosts "After-Ski Days". Switzerland was once again prominently represented from 24 to 27 November, and with its stand right at the entrance was able to appeal directly to snow lovers.

A total of 137,000 visitors flocked into the department store over the four days, to be greeted with cheese bites and brochures. In addition, the "NK Talks", featuring guests from sport, business or tourism, often included Switzerland. One example was an interview with the popular Swedish extreme skier Sara Orrensjö, who regularly trains in the Swiss Alps. The promotion was a great success and helped strengthen Switzerland's brand as the "Home of Snowsports."



The popular Swedish TV host and meteorologist Madeleine Westin was one speaker at the "NK Talks". She had recently been skiing in Graubünden, Switzerland.

Skiing on the Valais slopes in London.



Visitors to the Snow Centre indoor ski hall near London are offered an all-round Swiss experience.

ST's dual strategy taps new markets without neglecting important traditional markets such as the United Kingdom. The best example of this is the Snow Centre in Hemel Hempstead, north of London, an indoor ski hall, which has a potential 225,000 visitors annually.

Together with Valais/Wallis Promotion, ST signed a three-year partnership with the Snow Centre, enabling potential winter sport visitors to be inspired by Switzerland even during their first attempts at skiing – whether it be by the unique Valais alpine panorama on the walls of the hall, the restaurant with Swiss specialities, or the five travel deals to Valais developed by ST, which can be booked through the Snow Centre. The partnership launch was very successful, attracting great interest in the media – with articles in the British "Daily Telegraph" newspaper, "Le Nouvelliste" and reports on Swiss TV news programmes.

Meetings.

Continuing to promote diversification.

From an economic point of view, the Meetings sector remains challenging. A large variety of markets and types of meetings is needed to be able to compensate for possible decline.

The length of meetings and number of participants are tending to diminish. Important meeting clients from the financial and insurance industries have become more price-conscious and demand in

Europe is decreasing. In order to compensate for this decline, the Switzerland Convention and Incentive Bureau (SCIB) has continued to promote diversification with regard to the variety of markets and types of meetings. For example, there is great potential in incentives, particularly in Asia, and in congresses for associations. These tend to be less price-sensitive and Switzerland profits from its good image. In 2016 the SCIB was able to help many congresses come to Switzerland, the Association for Physiotherapy with 5,000 participants, and the conference of the International Moving Industry (FIDI) with 600 participants, among others. Together with other meetings and incentive trips, 2016 saw 1,479 offers processed and 797 meetings held in Switzerland.



The Bâtiment des Forces Motrices (BFM) in Geneva where a night-time event for the International Moving Industry (FIDI) was held.

Facts and figures.

"Switzerland stands for sustainable and superbly organised meetings with spectacular natural surroundings...here every inch of space is packed with experiences."

Segments



Congress Organizer

- Association Executive
- Swiss Member of International Association
- Institutional Executives



Meeting Planner

- Department Head
- Personal Assistant
- Agency Account Manager



Incentive Planner

- Meeting Executive
- Agency Account Manager

Meetings		2016	2015
Budget	CHF m	7.2	7.3
Share of total budget	%	7.8	7.6
Tourism revenue	CHF m	81.9	63.2
Visits to MySwitzerland.com/meetings		274,006	225,199
KAM-generated overnights		246,042	189,839
Number of meetings, events & conferences		797	784
Number of quotation requests processed by SCIB		1,479	1,311