

Marketing organisation

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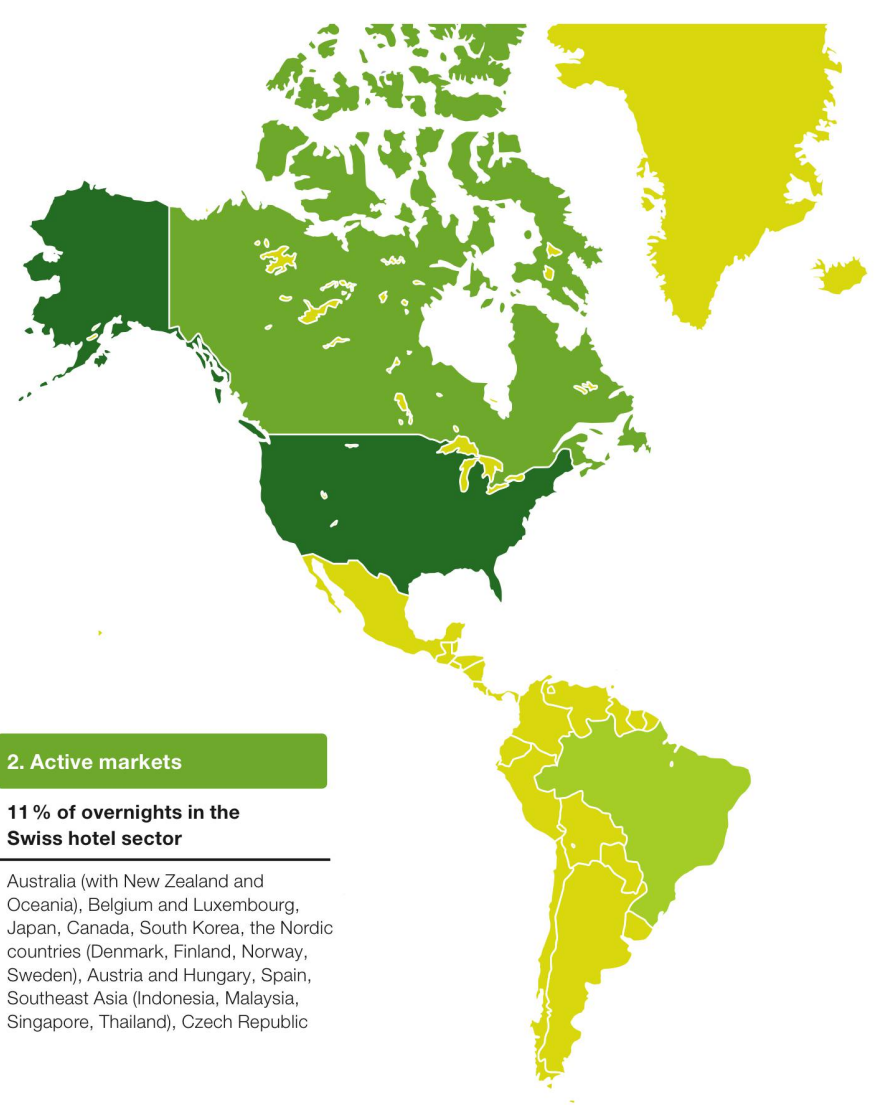
A row of ornate metal spoons hanging from a wooden rack against a dark wood background. The spoons have decorative handles with intricate carvings. The text "Marketing organisation." is overlaid in white on the lower part of the image.

Marketing
organisation.

1. Priority markets

75.2 % of overnights in the Swiss hotel sector

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



2. Active markets

11 % of overnights in the Swiss hotel sector

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

Switzerland Tourism in brief.

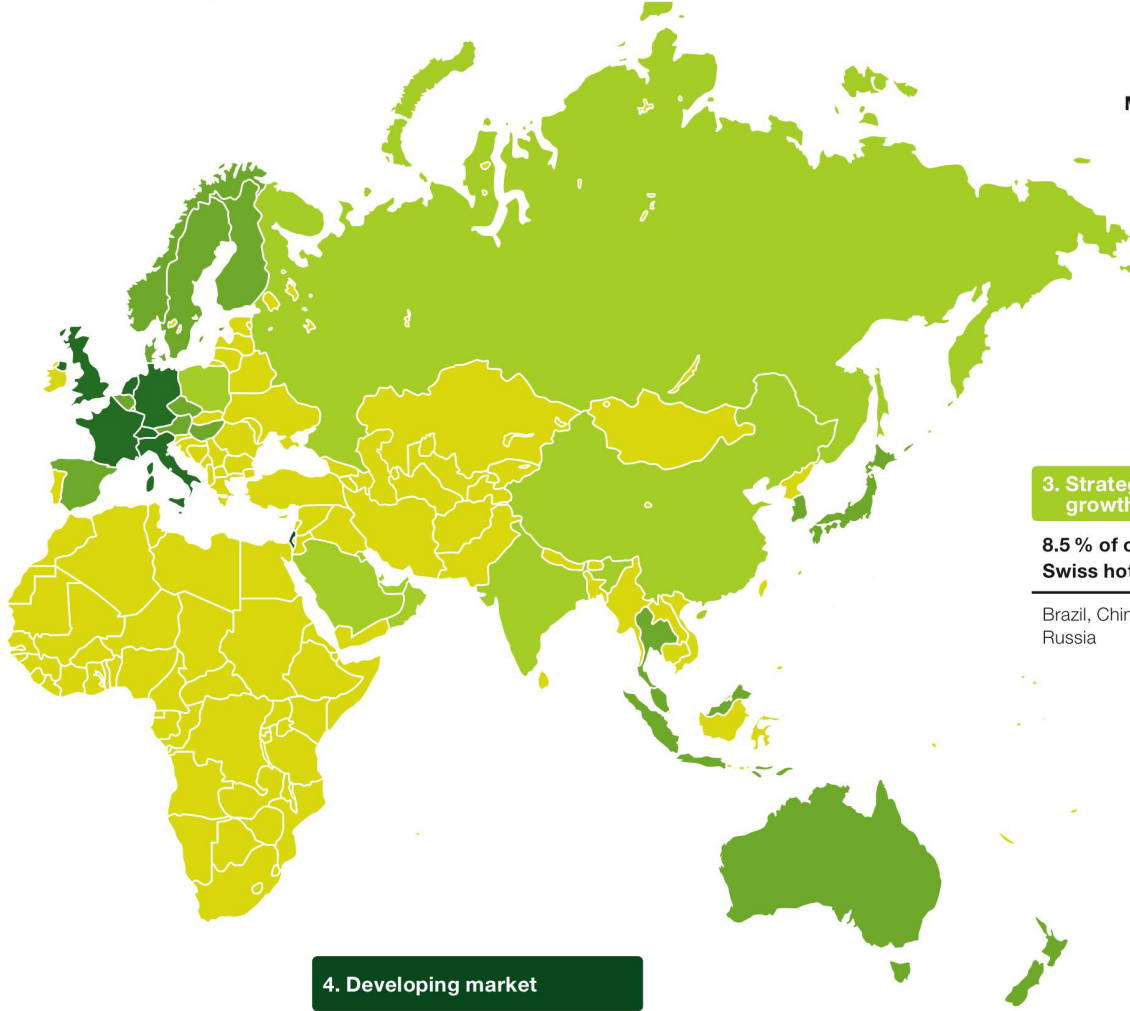
Switzerland Tourism promotes Switzerland worldwide as a holiday destination, under its slogan “Switzerland. get natural.” – alongside a clearly defined contemporary concept of Swissness.

The marketing organisation Switzerland Tourism (ST) has a long history. By federal mandate it has been promoting Switzerland at home and abroad as a holiday, travel and conference destination for more than 90 years. ST positions Switzerland as a tourism brand standing for quality, naturalness, authenticity, sustainability and modernity, under the overall concept of “Swissness”. To do so, ST develops a systematic marketing programme that it implements creatively with its partners through a full range of promotional and sales techniques. ST is a public corporation. Its board comprises 13 representatives from tourism, business and

industry associations. ST’s president is Jean-François Roth, while Jürg Schmid is responsible for operational management. Headquartered in Zürich, ST has a presence in 27 countries, employing 242 staff.

Facts and figures.

Regional representations		27
Headquarters in Switzerland		1
Staff		242
– of whom trainees		21
Spending	CHF m	95.44
– of which regular federal funding	CHF m	52.18
Spending abroad	CHF m	71.70
Degree of self-financing	%	45.13
Marketing budget/ marketing staff	CHF	305,900



3. Strategic growth markets

8.5 % of overnights in the Swiss hotel sector

Brazil, China, Gulf states, India, Poland, Russia

4. Developing market

0.5 % of overnights in the Swiss hotel sector

Israel

Positioning of the holiday destination Switzerland.



Nature



Authenticity

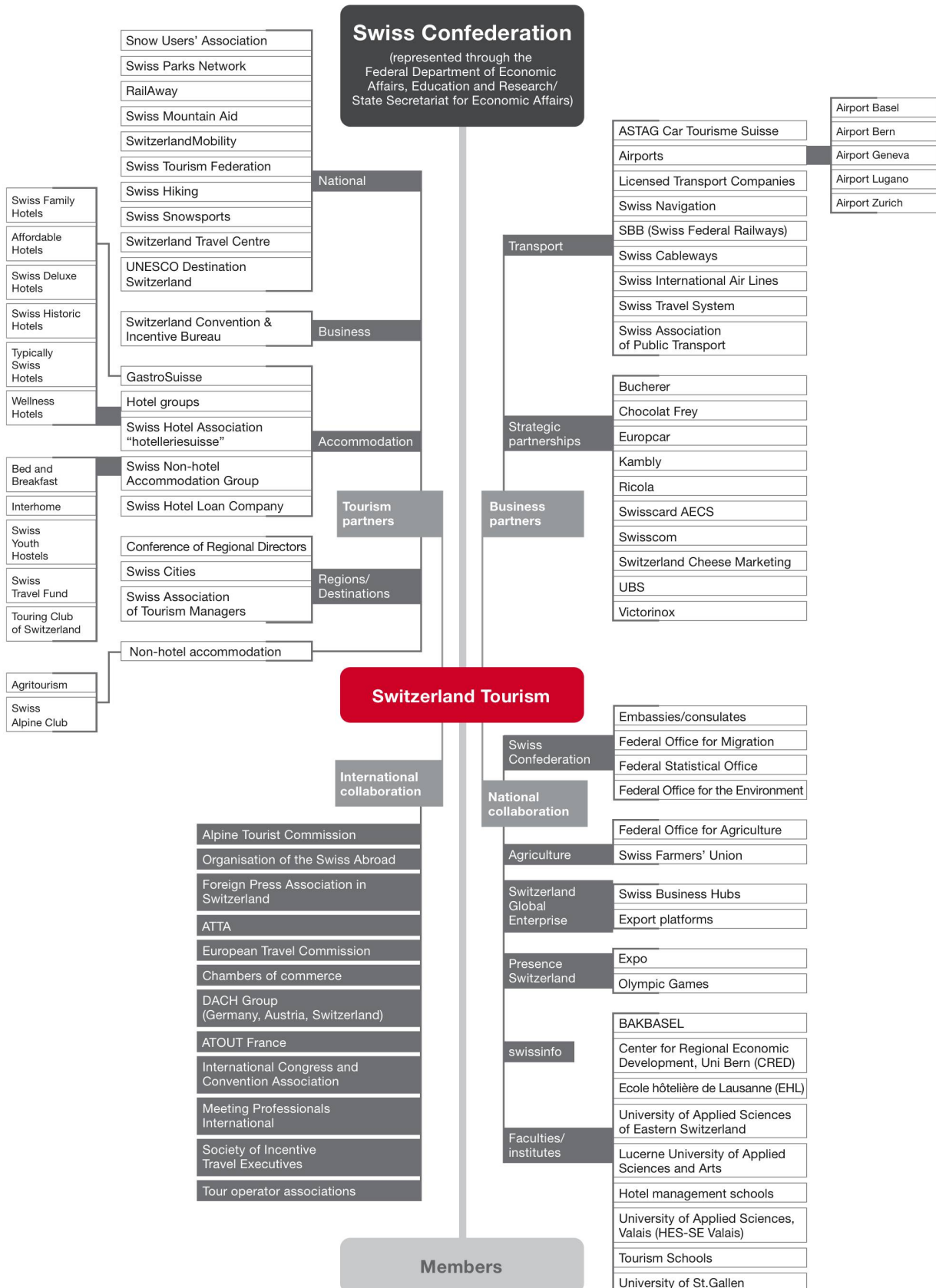
The Swiss experience → slogan: "get natural."

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 experience it offers.

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.



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.

ST market research is constantly updating and expanding a tourism-specific online library with selected studies and analyses. ST members enjoy access to this source of information, as well as – via the partner website STnet.ch – the business plan, medium-term planning and Tourism Monitor Switzerland (TMS, comprising results of a comprehensive visitor survey). They may use the “Switzerland Tourism. Member.” logo, and are listed as partners on MySwitzerland.com. Membership forms the basis for extensive collaborative opportunities. ST members also benefit from a network of tour operators, business partners and opinion-makers. Annual membership costs CHF 1,810.



An attentive audience: Switzerland Vacation Day 2013 in the Kursaal Bern.

Facts and figures.

Collaborations within the tourism sector	2013	2012
Participating partners*	993	908
Members**	695	696
Marketing income from partners	CHF m 27.22	24.79

* Including collaborations with hotels and STM

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



Switzerland Vacation Day: towards the future with a passion. “Sacred fire”: the guiding theme of ST's 16th Switzerland Vacation Day (SVD), the most important networking platform in Swiss tourism. In the Kursaal Bern, 1,447 participants took part in discussions, talks and interviews on national and global trends. Switzerland's friendliest hotels were recognised with the PRIX BIENVENU award in four categories (see page 19).



Left:
Switzerland Vacation Day. Federal Councillor Alain Berset interviewed by host Kurt Aeschbacher.

Right:
Hotel Marketing Day. Beat Blaser, Director of Independent Travel at Neckermann Reisen & Thomas Cook.

Hotel Marketing Day: “Grüezi Germany”.

The 4th Hotel Marketing Day was attended by 250 hotel operators. During a panel discussion, they addressed the question of how to win back German guests. One of the speakers, Cary Steinmann, Marketing Professor at the Zurich University of Applied Sciences, talked about how to generate enthusiasm for travel and Jürg Schmid, CEO of ST, introduced a new app for accommodation marketing.

Market key figures.

	Number of staff	Media reports generated	Visits to MySwitzerland.com	High-value customer contacts*	Marketing contacts
Priority markets					
Germany	17	2,229	2,047,007	414,740	2,098,386,100
France	10	535	1,546,563	184,285	646,999,266
Italy	9	1,362	2,032,243	496,269	768,242,742
The Netherlands	8	470	763,194	342,238	132,572,584
Switzerland (headquarters: activities for all markets)	127	1,351	10,818,709	324,600	364,000,000
USA (with Canada)	16	975	2,166,666	89,622	137,322,453
UK (with Ireland)	10	1,428	917,347	250,516	139,378,493
Active markets					
Australia (with New Zealand and Oceania)	1/(2)	299	182,928	15,000	20,000,000
Belgium (with Luxembourg)	4	642	472,461	52,000	140,331,331
Japan	8	115	878,382	44,696	242,361,428
Canada	2	incl. with USA	incl. with USA	incl. with USA	incl. with USA
South Korea	4	828	214,214	53,000	412,310,802
The Nordic countries (Denmark, Finland, Norway, Sweden)	(2)	65	173,910	36,000	20,000,000
Austria (with Hungary)	1/(1)	418	190,076	6,600	37,759,170
Spain	3	330	645,749	130,022	48,915,425
Southeast Asia (Indonesia, Malaysia, Singapore, Thailand)	1/(4)	96	277,627	11,700	9,372,000
Czech Republic	(2)	344	126,711	70,000	22,739,204
Strategic growth markets					
Brazil	1/(2)	74	169,455	133,000	34,660,000
China (incl. Hong Kong)	11	961	274,656	350,000	89,316,292
Gulf states	3	142	188,895	2,800	29,728,220
India	1/(4)	151	298,460	279,406	93,700,000
Poland	(2)	210	236,029	60,000	72,908,397
Russia	5	717	338,416	25,654	339,930,670
Developing market					
Israel	(1)	48	61,579	1,000	1,000,000

() Mandated staff

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

We have bottomed out.

The decline in overnights by visitors from Europe has been checked. Some modest growth has already been seen.

ST's local presence is paying off: visitors from priority markets with their own ST representation (above all the UK and US) are coming back to Switzerland in increasing numbers. Almost 80 % of all overnights were generated by priority markets. There was also pleasing growth in active

markets such as Southeast Asia, Australia, and the Nordic countries.

Growth markets are booming

Strategic growth markets once again provided the greatest rise in percentage terms. Overnights by visitors from China, the Gulf states, Poland and Russia rose disproportionately. India stagnated on account of its economic crisis, albeit at a high level. ST estimates 20 % growth in this sector over the next five years.

Impulse programmes are working.

With its impulse programmes, ST generated 23 times the revenue of the investment by federal government and industry. The final report proves this.

The parliament granted an additional CHF 36 million over three years to stimulate Swiss tourism, which had been shaken by the economic crisis. ST used these funds predominantly in strategic growth markets, close European markets, and the domestic market. We were able to generate over 4.1 million additional overnights with these funds.

This figure comes from the scientifically recognised ST effectiveness measurements, which are based on a comprehensive visitor survey, the Tourism Monitor Switzerland. The State Secretariat for Economic Affairs (SECO) also attested that the impulse programme had a “proven supportive effect on tourist demand and improved the competitiveness of Swiss tourism”.*

* Source: SECO, report on the structural situation and future tourism strategy of the Federal Council.



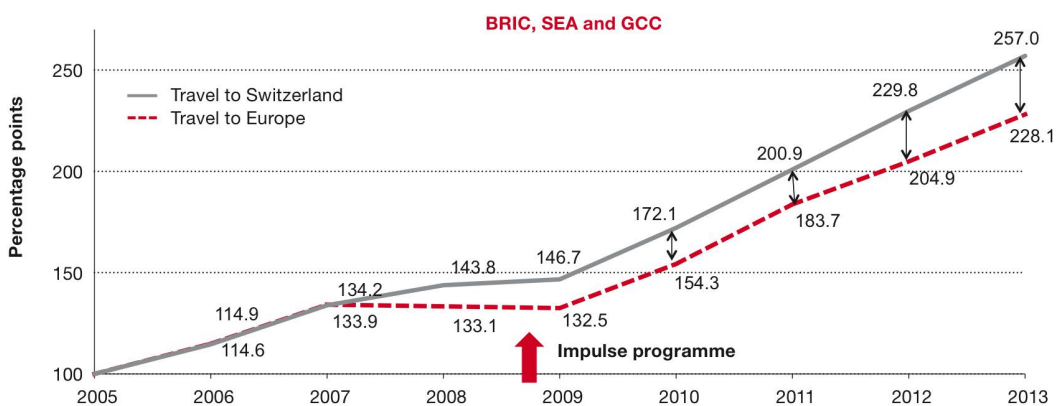
High growth potential for Asian visitors, as seen here on the Kleine Scheidegg, in the Bernese Oberland.

Facts and figures.

Impulse programme	Winter 12/13	Total*
Spending (federal government, partners, ST)	CHF m 3.6	40.4
Marketing contacts	m 619	5,700
High-value customer contacts	m 0.45	3.5
Additional revenue generated	CHF m 78.7	925
Additional overnights generated (all channels)	m 0.43	4.1
Participating partners	23	368
Markets targeted by impulse programme	CH, DE, FR, IT, NL, UK, RU, PL, AUS, BR, CN, GCC, CA, IN	

* Summer 2009 until winter 2012/13 (without summer 2010 and winter 2010/11)

Positive effects of the impulse programmes on hotel overnights.



Indexed figures: 2005 = 100 points
Sources: Oxford Economics, Federal Statistical Office accommodation statistics

Industry partnerships.

ST develops its marketing in the closest cooperation with the industry. The tourism regions are ST's central partners in cooperation and coordination. In 2013, 13 regional partners invested around CHF 10.7 million in common marketing activities with ST.



Passers-by enjoy the Basel posters in Milan's Duomo metro station.

Facts and figures.

Industry partnerships		2013	2012
Regional partners		13	13
Investment by regional partners	CHF m	10.73	9.18



In Ticino Turismo's TV ad, three young adventurers travel by moped to Ticino.

Ticino:

just two hours away.

How do you attract Swiss Germans to the south? Ticino Turismo launched a campaign for this purpose, which included a TV ad. In it, three young people take an adventurous journey south on a moped, eventually reaching their dream goal completely exhausted. The final caption makes it clear that travel is easier by car or train: "Actually just two hours away – Ticino." The launch and implementation took place in collaboration with ST and appealed strongly to 23 million TV viewers.

Basel/STS/Swiss Cities:

metro station in the limelight.

Together with STS, the Swiss Cities association and Basel Tourism, ST Italy utilised a large poster campaign to promote Eurocity connections to Switzerland, Swiss cities and the Beyeler Foundation in Basel. The attractive posters were displayed for a month in Duomo, Milan's busiest metro station, reaching 7.7 million passers-by.

"We were able to call on ST's experience and valuable support in producing this ad."

Elia Frapolli, Director Ticino Turismo

Valais:

"Grüezi Zwitterland".

As part of its family campaign, ST Netherlands collaborated with the partner region of Valais and KidsWeek, a Dutch weekly for children. 25,000 family brochures were distributed with the magazine, and at the same time the online game "Grüezi Zwitterland" went live. Children could design their top 5 holidays, make them tempting for their parents, and win a week's holiday in Valais in the linked contest.

Business partnerships.

The joint marketing activities of ST and its partners were characterised by quality and Swissness – and were a win for everybody.

ST's strategic and official partners gain attractive platforms for the global marketing of their products, and, as a result of their collaboration, benefit from ST's strong market presence. In return, they support ST financially and with products and services. Everyone wins from the authentic Swissness – and the quality and performance – of each individual partner. The resultant synergies don't simply open up new markets and channels of communication. Through targeted campaigns,

collaboration can lead to an above-average media resonance, even in existing markets. These marketing activities were a success for both ST and its partners in 2013. Only sponsor income was lower in 2013, due to the end of the collaborative project with the Jungfrau Railway as part of their jubilee.

Facts and figures.

Business partnerships		2013	2012
Strategic premium partners		4	4
Strategic partners		10	11
Official partners		18	16
Special partners		2	2
Revenue from sponsorship	CHF m	9.0	9.6



UBS:
a brochure with tradition.

In 2013, ST and UBS also realised an ambitious project on this year's ST theme: 350,000 brochures entitled "100 traditions & customs. Pure Switzerland." were distributed in UBS branches in Switzerland in German, French, Italian and English.



Kambly:
sink your teeth into Switzerland.

Switzerland's most popular biscuit brand has spruced itself up: new images from this year's ST theme "Authenticity, customs and traditions" decorated the packaging of the traditional Kambly Bretzeli. With this new approach, Kambly increased its revenue by 15%.

Chocolat Frey:



As a strategic partner of ST, Chocolat Frey got happiness hormones flowing with sweet souvenirs for Swiss fans.

Hotel
overnights.

	Overnights 2013	Overnights 2012	Change 2013/2012	in %	Overnights 2003	Change 2013/2003	in %
Priority markets							
Switzerland	15,889,226	15,690,035	199,191	1.3	14,933,267	955,959	6.4
Germany	4,573,496	4,625,384	-51,888	-1.1	5,461,369	-887,873	-16.3
UK (with Ireland)	1,708,918	1,607,958	100,960	6.3	1,873,193	-164,275	-8.8
France	1,350,164	1,318,460	31,704	2.4	1,151,374	198,790	17.3
USA	1,585,467	1,525,178	60,289	4.0	1,398,422	187,045	13.4
Italy	980,646	971,776	8,870	0.9	961,914	18,732	1.9
The Netherlands	709,937	726,636	-16,699	-2.3	801,838	-91,901	-11.5
Active markets							
Belgium (with Luxembourg)	747,845	720,628	27,217	3.8	809,680	-61,835	-7.6
Japan	491,651	509,757	-18,106	-3.6	558,528	-66,877	-12.0
The Nordic countries (Denmark, Finland, Norway, Sweden)	699,410	686,535	12,875	1.9	548,264	151,146	27.6
Austria (with Hungary)	491,069	465,153	25,916	5.6	386,863	104,206	26.9
Spain	427,310	434,669	-7,359	-1.7	292,357	134,953	46.2
Australia (with New Zealand and Oceania)	308,479	284,710	23,769	8.3	162,724	145,755	89.6
Canada	230,189	231,642	-1,453	-0.6	163,655	66,534	40.7
South Korea	187,966	172,467	15,499	9.0	105,339	82,627	78.4
Singapore	153,625	129,970	23,655	18.2	43,726	109,899	251.3
Czech Republic	111,569	107,324	4,245	4.0	53,459	58,110	108.7
Thailand	124,477	101,281	23,196	22.9	57,089	67,388	118.0
Malaysia	65,969	57,018	8,951	15.7	39,628	26,341	66.5
Strategic growth markets							
China	994,546	835,699	158,847	19.0	155,127	839,419	-84.4
Russia	578,656	561,490	17,166	3.1	239,996	338,660	141.1
Gulf states	623,205	518,842	104,363	20.1	248,674	374,531	150.6
India	467,967	474,882	-6,915	-1.5	196,896	271,071	137.7
Brazil	206,378	201,298	5,080	2.5	93,877	112,501	119.8
Poland	166,400	140,502	25,898	18.4	66,115	100,285	151.7
Developing market							
Israel	160,575	168,392	-7,817	-4.6	163,950	-3,375	-2.1

Overnights at Swiss hotels and spas (by selected countries of origin, partially aggregated)
Source: HESTA, Federal Statistical Office 2013, 2012 and 2003

Return to growth.

In 2013, the Swiss hotel sector recorded 35.6 million overnights. This represents a growth of 2.5% over the previous year. This gratifying result can be traced back to the traditionally strong domestic market (+1.3%) and the continued growth from Asian source markets and beyond. The neigh-

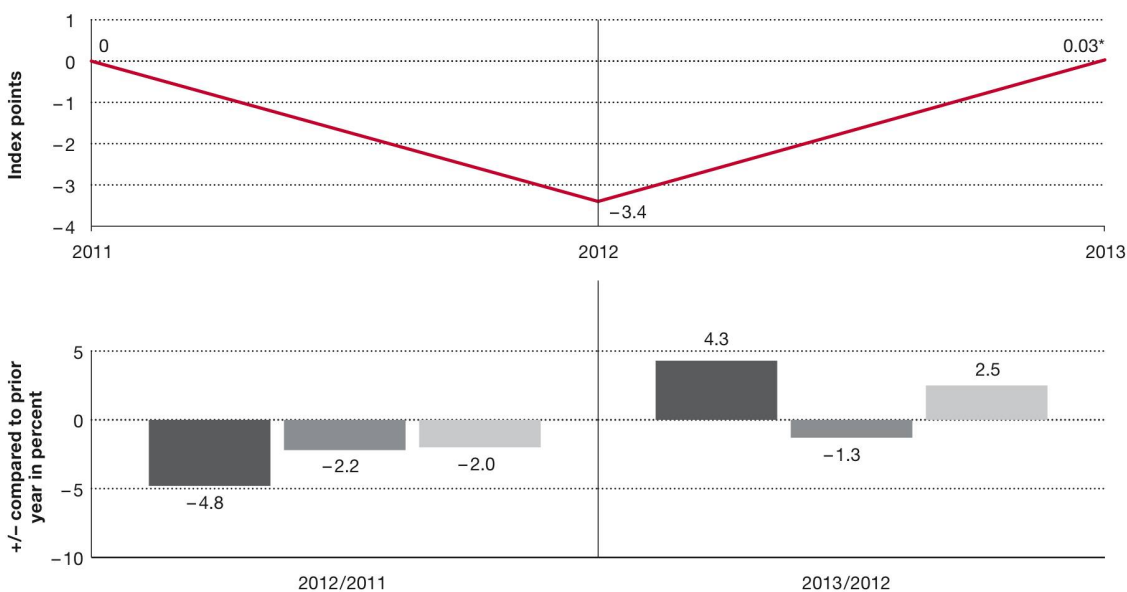
bouring European markets also recorded a slight recovery in overnight figures: the two established neighbouring markets of France (+2.4%) and Italy (+0.9%) showed repeated gains, while the decline in Germany (-1.1%) and the Netherlands (-2.3%) slowed. The overnight figures in the alpine regions (+1.4%) and in rural regions (+1.6%) rose, as they did in Swiss cities (+4.4%).

Tourism Development Index (TDI).

In order to enable an overall annual analysis of the various tourist industries, ST developed a measurement system which, in addition to the established analysis of hotel overnights, includes both non-hotel accommodation and day and event tourism. The development of the tourism industry's key pillars can now be seen in the form of an annually published index. The survey focuses on collating tourist frequencies (e.g. number of overnights, volume of passengers or registered entries), which constitute the basis for the consumption of tourist services, and thus for the industry's net product as a whole.

The data was first collected in 2011 and this forms the basis for further comparisons. In 2012 there was a decrease to 3.4 points, which was influenced by a decline in overnights and the cautious consumer mood in neighbouring European markets, among other factors. As a whole, ST developed positively in 2013 – the TDI registered an increase to 3.5 points. The reason for this is the stabilisation of the monetary situation and the incipient economic recovery in important source markets, as well as stable and favourable weather conditions in the summer season.

Tourism Development Index (TDI).



** "Züri-Fäscht" 2013 not included in the base case (total effect with 2.3 million additional visitors: + 3.7 points)
 Sources: hotel sector (HESTA, BfS and ST); day trips (ST)
 Preliminary final results, subject to changes.

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

In addition to the hotel sector, youth hostels also continued to grow (+ 3%). The number of overnights in the camping sector, however, has declined

(- 2%). Day trip and excursion tourism also yielded a positive result (+ 4%). As a whole, Swiss tourism has therefore overcome the worst.

Tourism marketing: a modular approach.

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

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

global market and media presence through ST's representations in 27 countries, and the provision of information to visitors via MySwitzerland.com. ST shares knowledge, findings from market research and crisis communication skills, and promotes quality development in the sector.

Opting for expertise and quality

ST relies on collaboration with suitable Swiss partners regarded as skilled service providers in their field, guaranteeing high quality standards.

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

Distinction through quality and cooperation.

In tourism, ST serves as the key information hub and centre of expertise for effective global marketing.

ST's aim is to be a leader and role model in tourism, with high-quality and creative marketing inspiring both regional and local partners in promotion, E-marketing, key account management and key

media management. ST specialists are closely involved in the development of sustainable tourism around Switzerland, taking on economic, social and environmental responsibilities as well as conserving the nation's cultural spaces.

ST works with 993 partners around the world and operates nearly 150 business plans with tour operators. ST opens up new sales channels to them and creates platforms for a stronger market presence – a service that particularly benefits smaller destinations.

Enjoy Switzerland.

Through Enjoy Switzerland, ST advises and assists tourism destinations in developing marketable and innovative products.

Industrial espionage in Glarus

Glarus has a rich industrial history, centred on beer, pastries and the unique Schabziger cheese. In 2013 the project "Industrial espionage" saw 11 local firms open their doors for tours. A flood of visitors resulted, along with over four million media contacts. The project will be repeated in the coming winter.



Gstaad Alpkäse repositions itself

Good cheese is like fine wine: not merely a culinary highlight, but a tourist plus for a region. For "Gstaad authentique" ST was involved in the market launch of Gstaad Alpkäse. Enjoy Switzerland assisted the local project manager and encouraged the positioning and advertising of the cheese experience as added value for tourists.



The management representatives of the winning hotels at the PRIX BIENVENU award ceremony on Swiss Vacation Day 2013: J. Zollinger, Hotel Villa Honegg, C. Fontana, Hotel Lugano Dante, Ch. Lienhard, Hotel Hof Weissbad, and Ph. Zurkirchen, Art.Boutique.Hotel Beau-Séjour (from left).

Hospitality.

The first PRIX BIENVENU for the friendliest hotels

At Swiss Vacation Day 2013, ST awarded the PRIX BIENVENU for the first time. Switzerland's friendliest hotels were judged on the basis of guest evaluations on over 250 booking and rating platforms by TrustYou, a company specialising in online reputation management. The PRIX BIENVENU will become an annual event. It offers recognition and motivation, but also emphasises the importance of online evaluation platforms and thus the value of guests' personal impressions.



Living tradition: fearsome forms with hideous wooden masks headline the Tschägä, a pagan carnival tradition in Valais.