

Switzerland Tourism.



Strategy and planning.

2023–2025





A big city with a green heart
Unwind in Lausanne's urban oases.

Lausanne, Canton of Vaud © Colin Frei

Plenty of reasons to be optimistic



Martin Nydegger
CEO Switzerland Tourism

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The effects of the pandemic have not yet been overcome. At the same time, we are facing more challenges at once than ever before. Burying our heads in the sand is not exactly our style, however. The tourism industry is all about emotions, passion and enthusiasm, warmth and cooperation – and also optimism. The Swiss people are – and will remain – the backbone of our tourism. The love that our European visitors have for Switzerland as a holiday destination has not wavered; their numbers are almost back to 2019 levels. That said, we are especially pleased that Switzerland remains a favoured destination for visitors from further afield. As soon as they are able to travel again, they will be doing so. There are therefore plenty of reasons to be optimistic – so let's get to work!

A time of change for Swiss tourism.

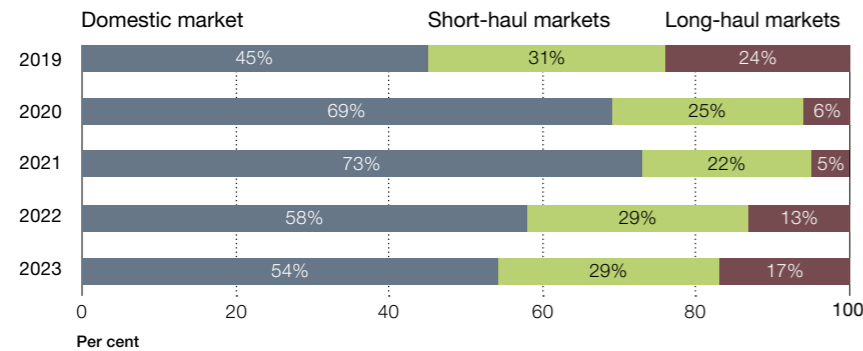
Making up almost 5% of foreign trade, tourism is Switzerland's fifth most important export sector. Covid-19 has impacted the sector particularly harshly. The recovery will take some time and will continue to have an effect on the mix of guests over the next few years as well.

Change in guest mix

The guest mix has changed a lot due to the pandemic. The following chart provides a visual representation of how we expect the mix to develop over the next few years.

Outlook distribution of the markets

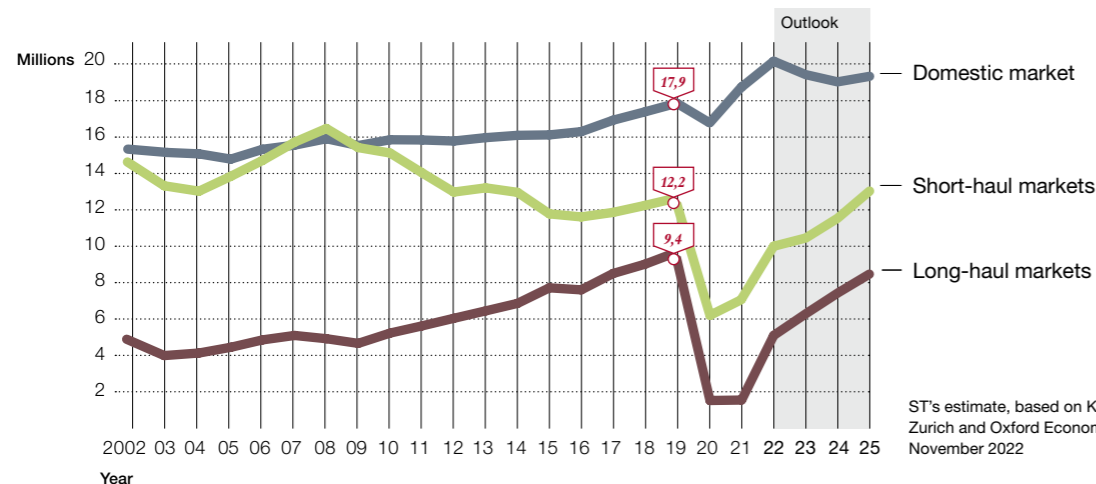
Hotel overnight stays (in per cent)



Switzerland Tourism (ST)'s estimate, based on data from the Swiss Economic Institute at the ETH Zurich (KOF) and Oxford Economics, November 2022

Development of the markets

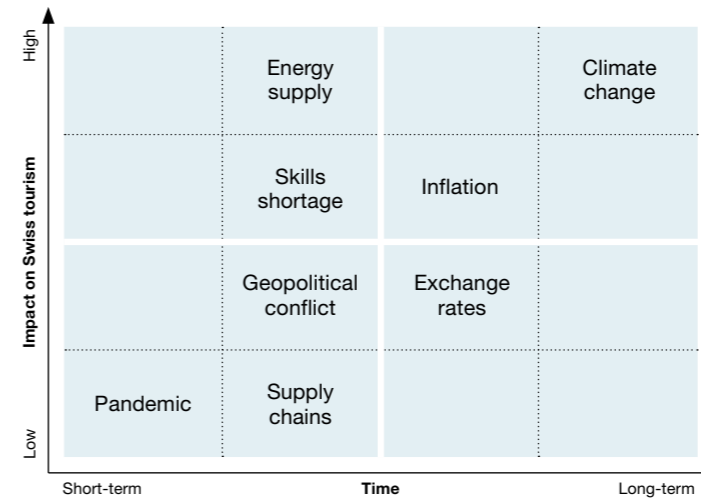
Development of hotel overnight stays including outlook (in millions)



ST's estimate, based on KOF Zurich and Oxford Economics, November 2022

Crisis areas within Swiss tourism.

Swiss tourism is currently having to contend with not just one, but numerous crises at once. The following eight crisis areas need to be addressed in the coming years.



ST estimate November 2022

Pandemic

Restrictions still in place, new waves possible, widespread uncertainty.

Energy supply

Threat of power cuts with repercussions for tourism, high fuel, mobility and production costs.

Supply chains

Hardware unavailable or subject to long waiting times and higher prices, impact on costs and pace of renewal.

Skills shortage

Services limited, quality and service level suffer.

Climate change

Weather phenomena such as summer heatwaves are becoming more frequent, future winter tourism under pressure, mobility is a contributor to climate change.

Geopolitical conflict

Uncertainty and fear, absence of visitors from Russia, impact on energy and the economy, possible escalation or spread.

Exchange rates

Historic lows for the euro, British pound, etc. are making Switzerland even more expensive.

Inflation

High inflation in our visitors' countries of origin is reducing their budget for travel, interest rates are rising and driving up loan/mortgage costs.



Overnights dashboard

The overnights dashboard is a dynamic solution for analysing monthly FSO accommodation statistics. It allows overnight stay data to be filtered by season, market of origin, tourist region and zone and now also by tourist destination.

The current trend in overnight stays can be viewed online at any time in the overnights dashboard: stnet.ch/overnights

Love Brand Switzerland.

The Brand Equity Monitor (BEM) measures Switzerland's strength as a summer destination brand relative to its competitors and identifies opportunities for the future. This survey of visitors and – for the first time – non-visitors from Switzerland, Germany, France, the Benelux countries, UK and USA provides 11 insights and recommendations for action.



The full Brand Equity Monitor can be viewed here:
[MySwitzerland.com/bem](https://myswitzerland.com/bem)



Battle for attention is intensifying

When asked about European summer holidays in nature, around one in five of the people in our target group mentions Switzerland: 17% in Germany, 20% in the USA, 21% in France and 23% in the UK.

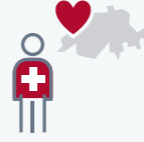
→ **Bigger, better, bolder: Switzerland Tourism (ST) needs to further strengthen Switzerland as a destination brand so that it comes to the top of people's minds.**



Brand strength influences funnel

The more strongly the destination brand Switzerland and its attributes are perceived by visitors, the more successful the journey through the various stages of the funnel will be, and the more frequently bookings will be made.

→ **Position Switzerland even more strongly as a destination brand and pursue targeted messages.**



A great love for our home country

Nine out of ten Swiss people have spent an outdoor summer break in this country and would recommend it to others. This means that there is a much greater love for one's home country here than in other markets surveyed.

→ **Encourage word-of-mouth promotion through targeted measures, because domestic visitors are the best ambassadors for Switzerland as a destination.**



Relaxation

The main driver for summer holidays amid nature is to relax in unique and varied natural landscapes. Natural features such as bodies of water, mountains and panoramic views are important.

→ **The brand essence defined by ST of maximum relaxation in a natural setting hits the mark and should be further translated into communication measures.**



Awareness of sustainability still low

Sustainability is not (yet) a decisive driver in visitors' travel decisions. What is more, Switzerland is outperformed by the Nordic countries when it comes to the perception of sustainability.

→ **Sustainability remains a mega-trend, especially among younger age groups. Persistence will pay off.**



Top ranking for "Quality"

Switzerland as a summer holiday destination ranked first for the "Quality" image attribute in all five markets surveyed, outperforming all its European competitors.

→ **It pays to consistently focus on quality. Switzerland can be successful by competing strongly on merits, meaning that price disadvantages recede further into the background.**



High recommendation rate

Switzerland as a summer holiday destination receives the highest rate of post-trip recommendations from all visitors other than those from Germany, compared with the competitor destinations surveyed.

→ **People who take a holiday in Switzerland are positively surprised, often recommend it to others and are likely to return. Attracting new visitors must be the top priority.**



Focus on the next generation

Destination Switzerland is attractive to the 18- to 35-year-old target group, but awareness of Switzerland as a travel destination is only half as high among young Germans, Britons and Americans as it is among the older generation.

→ **Step up marketing to young people, targeting them with content and offers that are relevant and attractive to this age group.**



Greatest market potential is in Germany

The image of Switzerland as a destination brand is weakest in its biggest foreign market – across all surveyed markets and relative to its direct competitors.

→ **Germany, the largest foreign market, offers the greatest potential to make up ground.**



Scoring highly for family-friendliness

The expectations for family-friendliness are not yet fully met, as is borne out by the difference in ratings between visitors and non-visitors and by comparison with foreign competitors.

→ **Tourism service providers can score points with creative, family-friendly offerings. However, Switzerland has a lot for families to get excited about.**



Improve on hospitality

Domestic and German visitors are least positive about Switzerland's hospitality. Switzerland came out best on this score in the US market.

→ **By instilling a lot of warmth and implementing good training at grassroots level, hospitality can be easily improved at all points of contact.**

ST journey



The sky is the limit
Experience the first-ever ski tour in Davos Klosters.

Davos, Graubünden, © Lorenz Richard

Impact in ten steps.

Put in highly simplified terms, the work carried out by Switzerland Tourism (ST) can be broken down into ten steps. The individual steps are addressed in detail over the next few pages.

1. Federal mandate

To grow tourism demand for Switzerland as a holiday, travel and conference destination both domestically and internationally.

2. Vision

Tourism is thriving throughout Switzerland.

3. Mission

ST inspires enduring interest in travelling to Switzerland.

4. Tourism objectives

- To attract new visitors
- To increase overnight stays
- To extend length of stay
- To increase added value
- To seek balance

5. Priorities

- Campaigns
- Market mix
- Digital leadership
- Recovery 2.0
- Swisstainable

6. Inputs

Human and financial resources at 34 locations in 23 markets

7. Activities

Campaigning & activation

Analogue and digital campaigns and market activities

Key media management

Media relations in Switzerland and abroad

Partner integration

Tourism partners
Strategic partners

Key account management

KAM Leisure
KAM Business

10. Impact

The tourism objectives are met, and the Switzerland brand is strengthened long-term → impact measurement

9. Outcome

The activities trigger reactions among visitors → outcome measurement

8. Outputs

The activities reach the desired target group → performance measurement

What does Switzerland Tourism do?

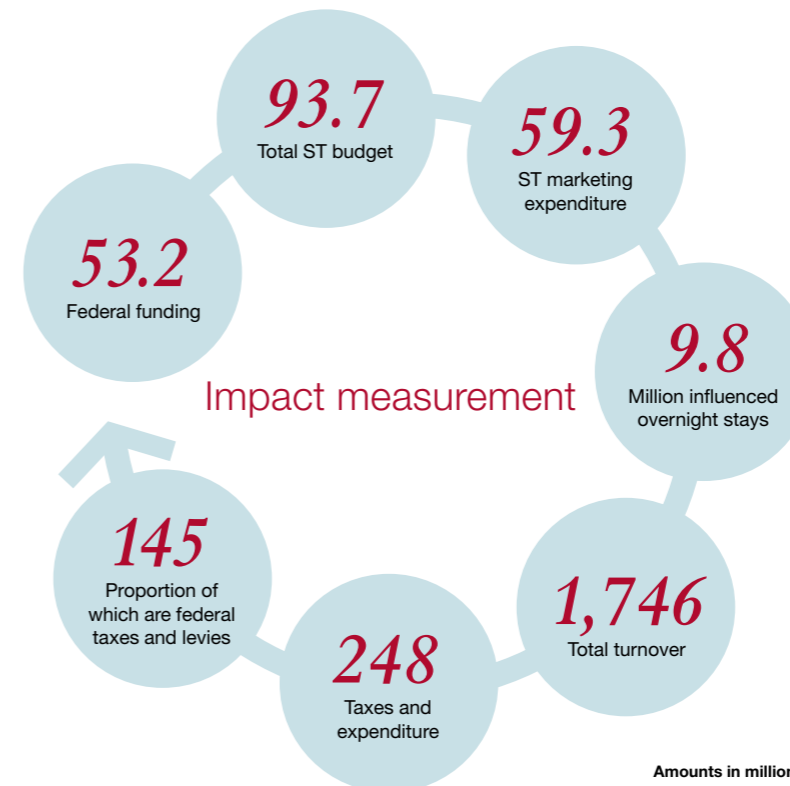
Any country, however beautiful, needs to be marketed and promoted. That's why Switzerland Tourism (ST) was tasked by the Swiss Confederation with promoting domestic and international tourism demand for Switzerland as a holiday, travel and conference destination.



ST focuses on the development and implementation of effective marketing programmes and the establishment of a strong Swiss tourism brand. ST works hand-in-hand with the tourism industry, offering its over 700 members and 1,200 partners attractive marketing platforms both domestically and abroad. ST works with customers and markets in mind and

operates in accordance with commercial criteria. The 13-member Board of Directors is drawn from the fields of tourism, business and related professional associations. ST is present in 23 markets worldwide, employing around 270 people (240 full-time equivalent positions).

ST is a corporation under public law and is dedicated to the following tasks on behalf of the Confederation:



Every franc invested by ST in marketing generates CHF 29 of tourism turnover. The 2017 ST impact measurement verified by the University of St. Gallen shows that ST has an influence on one in seven overnight stays. This means that every franc spent by ST on marketing generates tourism turnover of CHF 29. ST is thus responsible for a total turnover of around CHF 1.75 billion each year. The impact measurement described is based on the figures from 2017. The next impact measurement will be published in 2024.

Amounts in million CHF

Overnight stays and turnover calculation: ST
 Tax information: estimate by Rütter + Partner, extrapolation by ST
 Impact measurement model verified by the University of St. Gallen

Tourism objectives.

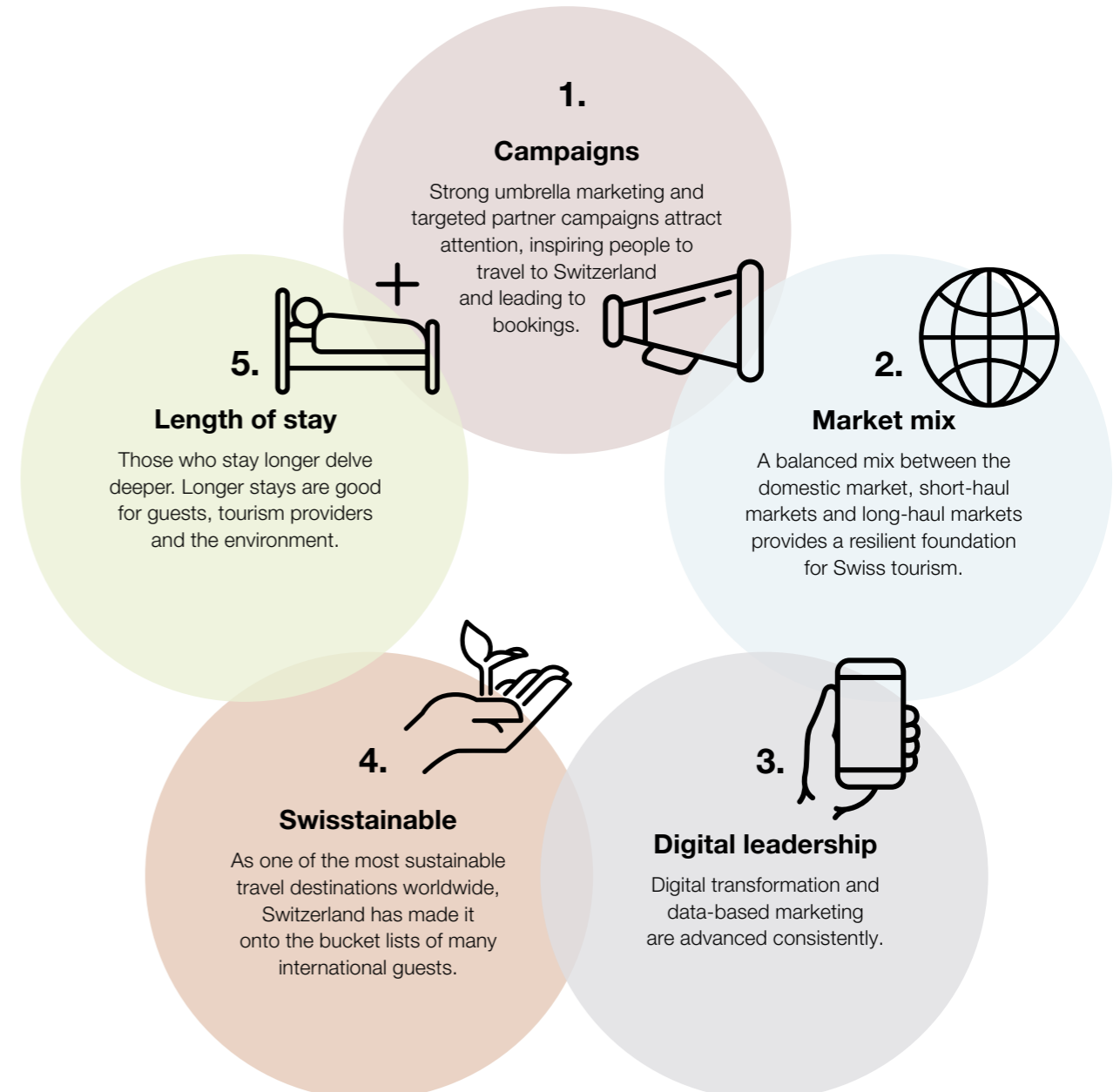
Aiming to achieve nationwide prosperity in the Swiss tourism industry, Switzerland Tourism (ST) is committed to the following five overarching objectives:

- 1 Inspiring new visitors**
ST takes on the complex and expensive task of addressing new visitors.
- 2 Increasing overnight stays and frequency**
The existing excellent tourism infrastructure is exploited as effectively as possible.
- 3 Increasing length of stay**
Visitors come to Switzerland for as long as possible.
- 4 Increasing added value**
As a premium destination, Switzerland generates high tourism-related added value, thus enabling innovations and investments.
- 5 Seeking sustainable balance**
Seasonal and geographical diversification, a balanced mix of guests and responsible action will ensure sustainable tourism development.

ST will determine the priorities for 2023–2025 and the quantitative targets for 2023 from the overarching tourism objectives. All of ST's activities will contribute to the attainment of the five tourism objectives.

Priorities 2023–2025.

Switzerland Tourism (ST) is focusing on five strategic priorities to enable Switzerland to be marketed to optimum effect in the future. Mutually beneficial cooperation with the tourism partners is the key in all priority areas.



Brand wheel.

Switzerland is well positioned as a destination. According to the Brand Equity Monitor conducted in the summer of 2022, Switzerland’s brand values are rated very positively. However, Switzerland Tourism sees room for improvement in the “Convenience,” “Distinguished” and “Refreshingly different” areas.

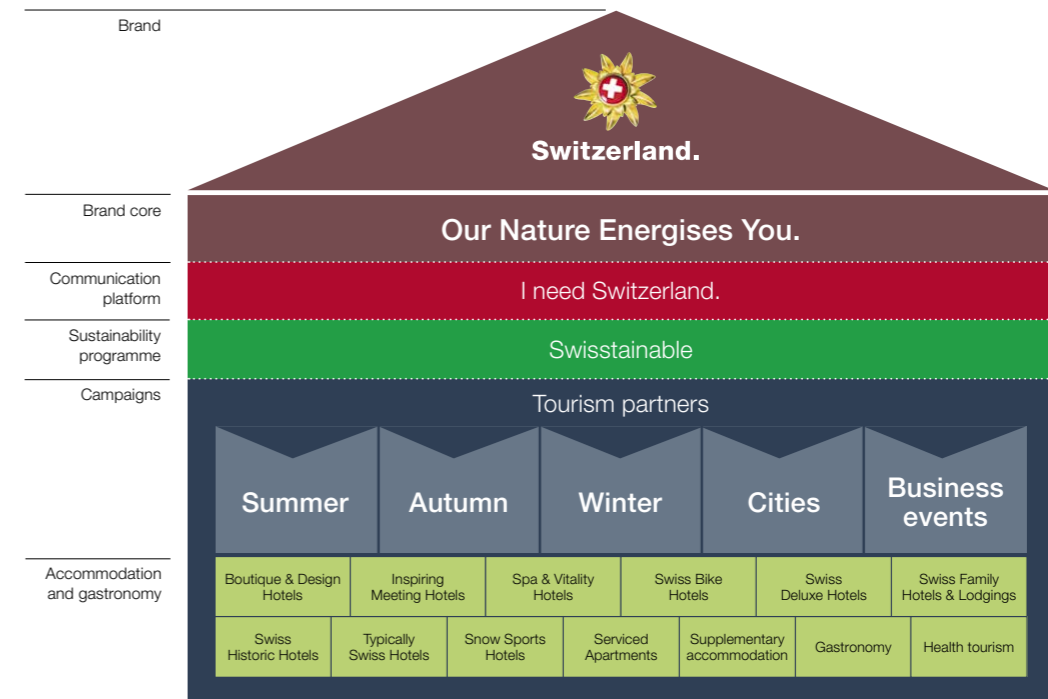


Convenience
Improving the visitor experience and removing barriers for visitors will require a lot of work on both the offering and the communication. Various projects are also planned in the digital space (e.g. Snow Sports app, Grand Tour of Switzerland app, etc.).

Distinguished and Refreshingly different
To help the Switzerland destination brand sufficiently stand out and attract attention, the tone is being developed further and deployed in an even more targeted manner.

“I need Switzerland.” manifesto.

“I need Switzerland.” stands for the ultimate in relaxation, as unspoiled nature that is also easily accessible can be experienced in Switzerland. Anyone wanting to experience a sunset against breathtaking panoramic views is able to get there promptly and reliably, while anyone wanting to cool off outdoors can simply take a dip in one of the country’s crystal-clear lakes whenever they like. In short, if you really want to relax, if you really want to escape the stresses of everyday life or if you really want to return to everyday life full of a new sense of energy, then you need more than just a holiday. What you really need is Switzerland.



Brand house (three key guiding themes)

- “I need Switzerland.”: a global advertising slogan supported by ambassador Roger Federer
- Swisstainable: a multi-year initiative that focuses on positioning Switzerland as a sustainable travel destination
- Partnership campaigns: tourism partners (RDK, DMO, accommodation and gastronomy) are participating in various campaigns (Summer, Autumn, Winter, Cities and Business events)

Brand development

The brand image is being transferred to the digital space and geared to the future in order to achieve an even more positive effect. The Switzerland destination brand is already highly recognisable and has all the corporate design elements required for a good image: meaningful, emotive images, a design classic as a corporate typeface, a distinctive colour

scheme, and a characteristic and emotional logo. After having refocused on the brand profile, the visual presence of the brand will now also be modernised, including with respect to consistency and intrinsic value. The defined values and the tone should also be evident visually. And the destination brand should be made more accessible for the industry.

Winning back international visitors.

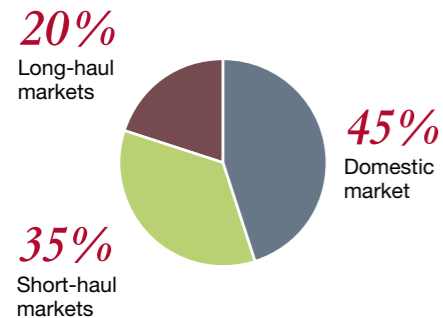
The main focus of Switzerland Tourism (ST) over the next few years will be on winning back international visitors. A balanced mix of visitors is a key prerequisite for lasting success and sustainable tourism.

The right mix is how we succeed in meeting our tourism objectives:



A well-balanced market mix

ST sees the ideal market mix as 45% domestic visitors, 35% European visitors and 20% visitors from long-haul markets. In line with the sustainability strategy, ST's international focus is on individual travellers and visitor segments with a great affinity for Switzerland's outdoor, cultural and rail offerings, along with organised business travel and business events.



Proximity to customers

ST is represented where the most important customers and intermediaries for Switzerland as a tourism destination can be found. Employees in the market are familiar with the local culture and the right channels and platforms on which to advertise Switzerland and motivate potential visitors to travel. Presence in the markets and direct contact with customers will be even more of a priority in the post-pandemic years. That is why the market network is being expanded with six new "antenna" offices.



Switzerland Travel Experience Japan



ST works with its market key partners to promote Switzerland in major international cities, here New York.

Extended arm of the tourism industry

Each ST market offers key partners competent advice and a wide range of activities. The offering ranges from individual campaigns to tailored, integrated market key partner campaigns, for which the entire marketing mix is applied. This ensures tourism partners have access to market knowledge and an established network. ST brings together partner resources and, in addition to human resources, also provides investment of 20–30% from its own funds. Shared activities achieve a great deal of attention, make an impact and ensure a visible market presence for partners at a reasonable cost.

Strengthening of central campaigns

In close coordination with Marketing, the strong central campaigns and messages in the markets are translated into the corresponding languages and adapted to cultural sensitivities. In addition to centrally selected global platforms, the markets teams look for targeted and cost-efficient local channels to effectively distribute content in their markets.



Priorities for 2023–2025

Winning back international visitors

Advertising Switzerland's cities and acquiring international business events

Swisustainable: promoting sustainable travel with reliable and attractive content and experiences

Extending the length of stays with products that motivate visitors to discover more (such as the Grand Tour of Switzerland and the Grand Train Tour of Switzerland)

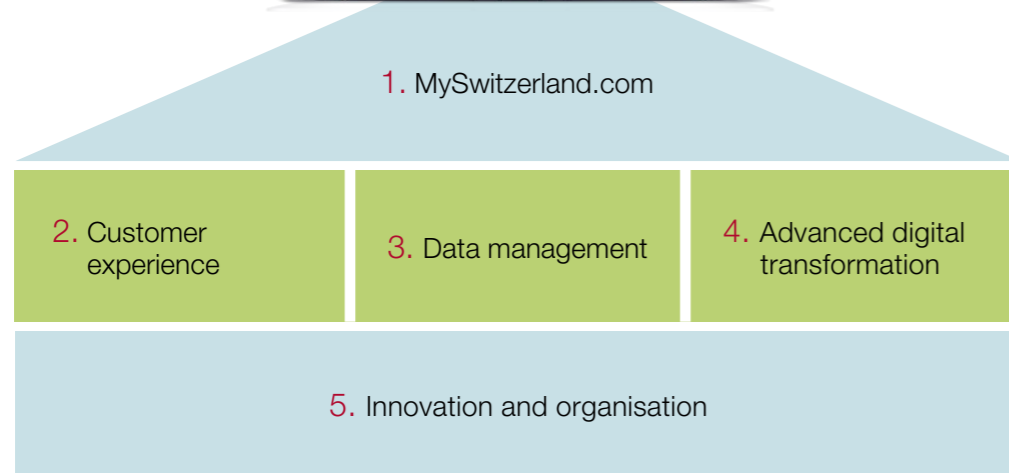
Market goals 2023

Business plans, market prospects and criteria for the markets can be found here:

stnet.ch/maerkte

Digitalisation as an integral part of the entire organisation.

Switzerland Tourism (ST) sees digitalisation as an integral part of the entire organisation and all touch points, whether for visitors, business partners or internal stakeholders.



Market positioning as a digital leader requires a comprehensive strategy that builds on previous achievements, examines new opportunities and strives for constant further development. The digital strategy consists of five core topics, divided into

the strong umbrella of ① MySwitzerland.com, the three priority areas of ② the customer experience, ③ data management and ④ advanced digital transformation, and the broad foundation of ⑤ innovation and organisation.

1. MySwitzerland.com: The position of MySwitzerland.com as the world's most visited website run by a national tourism organisation is something we need to maintain and build upon in a targeted manner. MySwitzerland.com serves as the hub for organic visits and is an integral part of all campaigns. Planning and travel are even more convenient thanks to the established Snow Sports app. The Grand Tour app, which was launched in 2022, offers visitors for the first time a digital planning and navigation assistant, helping them to create a tailored visitor experience.
2. Customer experience: Inspiring visitors – also our motto when it comes to our digital channels. To motivate people to travel to Switzerland, the various touchpoints must respond to potential visitors' diverse needs. ST is developing a framework based on personas and mindsets to delve even deeper into visitors' needs and serve them with relevant data-driven content.
3. Data management: The new CRM Competence Centre and the newly formed Market Research & Data Analytics department employ digital technologies to collect data on potential visitors and use it to address them in a targeted manner compliant with data protection rules. The new CRM architecture includes a Customer Data Hub and a new direct marketing solution. ST is also preparing for the end of the "cookie era" with a new analytics platform.
4. Advanced digital transformation: Digital transformation offers excellent opportunities that go beyond conventional tourism marketing. Matchmaking between tour operators and service providers is made simpler on the digital B2B marketplace MySwitzerland Pro. All existing B2B touchpoints are bundled together and presented to customers in the form of a B2B portal. ST is also cooperating with a telecommunications company to enable it to better predict visitor numbers at popular touristic sights and thus help manage visitor flows.



Discover Switzerland's highlights with the Grand Tour of Switzerland app:



5. Innovation and organisation: ST closely monitors trends in order to identify the latest technologies and digital opportunities and incorporate them in specific projects. As an organisation, ST responds flexibly to new developments, thereby generating sustainable added value.

Metaverse developments

ST is continuously monitoring developments around the topic of the metaverse and examining new opportunities. For example, visitors can now use augmented reality in the Grand Tour app to collect virtual objects (NFTs) along the Grand Tour route. The possibilities are unlimited and can be adapted to the multitude of new digital forms of interaction.

Cooperation with the tourism industry

The tourism data that ST includes in the Experience Hub MySwitzerland.com is structured to make it freely available to the tourism industry and third parties under an open data approach and can be used for new and innovative applications. Interaction with the industry is being intensified in order to work together to address key issues relating to the digitalisation of Switzerland as a tourist destination, harness synergies and offer visitors the ultimate in convenience.

Sustainability has a name.

The pandemic has further increased our desire for authentic experiences, proximity to nature and considerate consumption. With Swisstainable, Switzerland Tourism (ST) is promoting a sustainability movement with which Switzerland's entire tourism community can affiliate itself.



Our vision

To be the most sustainable travel destination in the world.

The focus on sustainability should become a competitive advantage for Swiss tourism and bring real added value for visitors.

Lago di Saaseo, Graubünden, © Switzerland Tourism, Nicola Fürer

Not interchangeably “sustainable”, but uniquely “Swisstainable”

The Swisstainable banner underlines ST's long-term commitment to sustainable travel. Combining the terms “Swiss” and “Sustainable” signals an independent and, above all, typically Swiss sustainability strategy. Switzerland's tourism strengths, such as its public transport, breathtaking nature, clear water and clean air, are the focus of attention. Swisstainable is always communicated in a fresh and positive way.

Switzerland Tourism's commitment

ST also takes sustainable development to heart as an organisation. It is seeking TourCert certification and ‘Swisstainable level III – leading’ in 2023. ST will also reduce and offset CO₂ emissions from its own flights in 2023 by using sustainable aviation fuel (SAF) and via MyClimate.

A programme for the entire industry

Sustainability can only happen if we all work together, and it requires the support of the entire tourism industry. That is why ST works in close collaboration with the State Secretariat for Economic Affairs (SECO), the Swiss Tourism Federation (STV-FST), the regional tourism organisations (RDKs), the destinations and the service providers. All service providers who are committed to sustainability can use the Swisstainable label. Admission to the programme and classification into one of the three levels is handled by the STV-FST's Competence Centre for Sustainability (KONA).



Targets

1. **Guidance for visitors:**
Switzerland will be perceived as a sustainable destination by 5% more visitors by the end of 2023 compared with 2021.

2. **Support for the industry:**
By the end of 2024, 4,000 businesses and organisations will be participating in the Swisstainable programme.

3. **Commitment by ST:**
ST will achieve Swisstainable level III with TourCert certification in 2023.

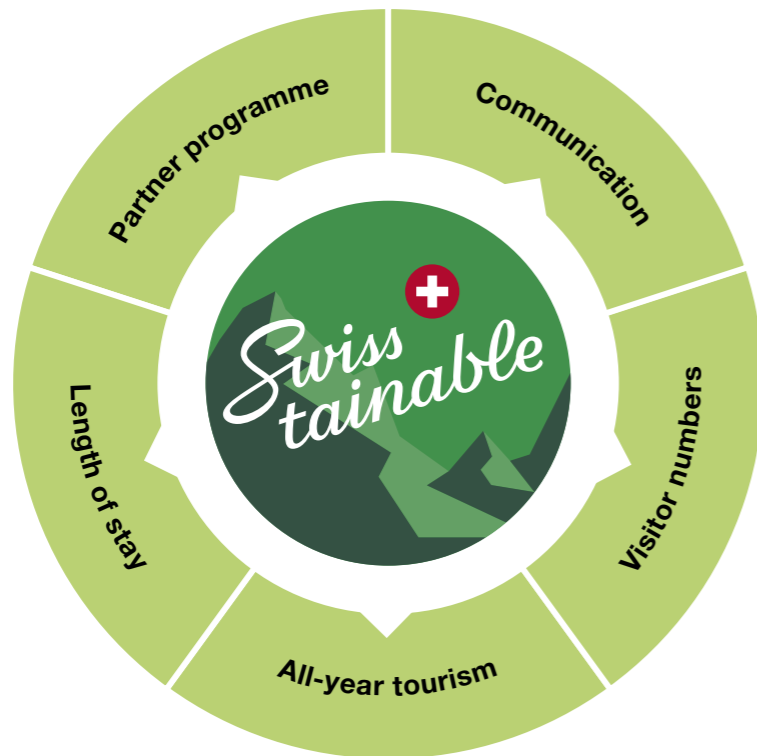
Emphasis on benefits for visitors

Swisstainable is presented using a positive and inspiring communication style that conveys sustainability in a refreshing way: never as a sacrifice, always as an enrichment. ST focuses on four topics, while always emphasising sustainable experiences and benefits for visitors.

Topics	Mobility	Water	Localism	Hospitality
Focus in 2023	Public transport	Cities	Food	Naturalness

Strategy for sustainable tourism marketing.

In addition to the Swisstainable programme and Swisstainable campaigns, Switzerland Tourism (ST) also advocates for an even spread of visitor numbers, year-round tourism and longer stays.



Even spread of visitor numbers

The diversity of Switzerland's tourism offering means that visitor numbers are more evenly spread across the country than elsewhere. Nevertheless, further work is needed in this area. To ease capacity bottlenecks, ST provides information on and predictions of visitor numbers and suggests alternatives. Touring experiences (Grand Tour of Switzerland, Grand Train Tour of Switzerland) and the "In love with beautiful places" profiles also help achieve a better geographical distribution.

Year-round tourism

There is still too much variation between the individual months. Sustainable tourism marketing strives for diversification in terms of time. ST promotes this by having a diverse market portfolio: for example, the peak travel season for visitors from India is May, while it is September for the Chinese market. ST is also promoting autumn as a growing and attractive (off-)season. The business tourism, health tourism and Destination Weddings promoted by ST take place almost entirely outside of high season.

Longer stays

"Less often, for longer" is the new "more often and shorter". Rising mobility prices are further fuelling this trend. In international statistics, Switzerland is ranked in the middle, with an average stay of two nights per hotel. Measuring this is challenging, however, since stays are recorded per hotel rather than per trip. ST has therefore set itself the goal of developing a more meaningful measurement method.

There are numerous good reasons to extend the length of stay; here are the five most important in a nutshell:



A concept and specific measures to extend visitors' length of stay are being developed for 2023–2025.

Approaches for achieving longer stays

Here are some possible approaches ST can take to help extend visitors' length of stay. These will be fleshed out further.

1. Switzerland is presented in the markets as a mono-destination.
2. Market activities and tour operator agreements have to include longer stays (e.g. more than three nights).
3. Length of stay is added to the market prioritisation criteria.
4. Emphasis on multi-day offers: Swiss Travel Pass, Grand Tour of Switzerland, Grand Train Tour of Switzerland, etc.
5. MySwitzerland.com and social media channels give visitors tips on how they can get more out of their trip to Switzerland by staying longer.
6. Specific storytelling and attractive products encourage visitors to have more Swiss experiences and stay longer.
7. Business events can be leveraged for additional private hotel overnight stays.

The industry is also encouraged to come up with ideas. Two possible examples:

- Proactively offering extensions to visitors who have already booked. Seminars and conferences, for example, offer an opportunity for private extensions.
- Incentive systems are a good tool for encouraging visitors to stay longer. The "problem night" of Sunday to Monday is gaining in significance due to more flexible working methods (remote working) and can be offered more attractively.

Quantitative goals for 2023.

By achieving quantitative performance goals, Switzerland Tourism (ST) will be contributing directly to the stabilisation of Swiss tourism. Strong emphasis will be placed on the relevant key performance indicators.

Key performance indicators (KPIs)

A single marketing instrument on its own is not enough. Optimal impact can only be achieved by an ideally designed cross-media mix and the effective use of resources. ST continuously measures its own performance on the basis of the following KPIs*, which it has developed further and which are divided into outputs and outcome.

Campaigning & activation

The marketing campaigns and market activities include both digital and analogue advertising measures. The focus is on inspiring messages that grab the attention of potential visitors, awakening their desire to travel.

Outputs	Actual 2021	Forecast 2022	Budget 2023
How many people have the activities reached?			
Top marketing contacts	2.7bn	3.4bn	3.3bn
Web visits to MySwitzerland.com	33.2m	19.8m	35m

Outcome	Actual 2021	Forecast 2022	Budget 2023
Have the activities triggered reactions among visitors?			
Engagement rate	1.57%	1.2%	1.6%
Customer reactions	15.5m	13.6m	11.3m

Key media management (KMM)

Editorial reporting is initiated by the ongoing production and distribution of news and stories about Switzerland as a travel destination, tailored for the media.

Outputs	Actual 2021	Forecast 2022	Budget 2023
How many people have the activities reached?			
Top coverage media	5.1bn	5.4bn	4.8bn
Qualified interactions with media	13,236	11,594	12,050

Key account management (KAM)

ST is committed to recruiting, supporting and training tour operators, travel agents and business event specialists with the goal of boosting Switzerland's profile among the travel trade.

Outputs	Actual 2021	Forecast 2022	Budget 2023
How many people have the activities reached?			
Qualified interactions with KAM Leisure	16,103	18,350	20,655
Qualified interactions with KAM Business events	8,272	7,485	8,930
Business event requests for proposal	385	648	845

Outcome	Actual 2021	Forecast 2022	Budget 2023
Have the activities triggered reactions among visitors?			
Turnover influenced by tour operators	0.3bn	0.5bn	0.7bn
Turnover influenced by business events	15.1m	53.4m	59.7m

Partner integration

ST is working in close collaboration with the tourism industry and selected corporate partners to effectively and profitably present Switzerland as a tourism destination, both at home and abroad.

Outputs	Actual 2021	Forecast 2022	Budget 2023
How many partners did we win?			
Investment in tourism partners	24.2m	24m	26m
Investment in corporate partners	6.2m	8m	8.1m

Outcome	Actual 2021	Forecast 2022	Budget 2023
How satisfied are the partners?			
Satisfaction among tourism partners	-	-	8.0
Satisfaction among corporate partners	-	-	8.0

* Provisional figures from 1 November 2022, including recovery programme. The KPI Manual can be found on STnet.

Precisely addressing visitor needs.

Visitors are at the centre of Switzerland Tourism (ST)'s marketing. In order to be able to address them with even greater precision in future, ST is developing empirically based personas for the entire tourism industry.

ST intends to further improve the way it addresses target groups and make this more contemporary. Segmentation opens up the possibility of creating very precise profiles of potential customers. These are called personas, and they help companies to empathise with the target group within a customer-centric approach. Personas also help gain a better understanding of what potential visitors feel, what

they think and what their hopes or concerns are. ST is in the process of developing a set of personas for Swiss tourism through an interdisciplinary project. The first phase involves conducting a qualitative study in three markets, with external support. In the second phase, the personas will be validated, quantified and made applicable in nine priority markets.

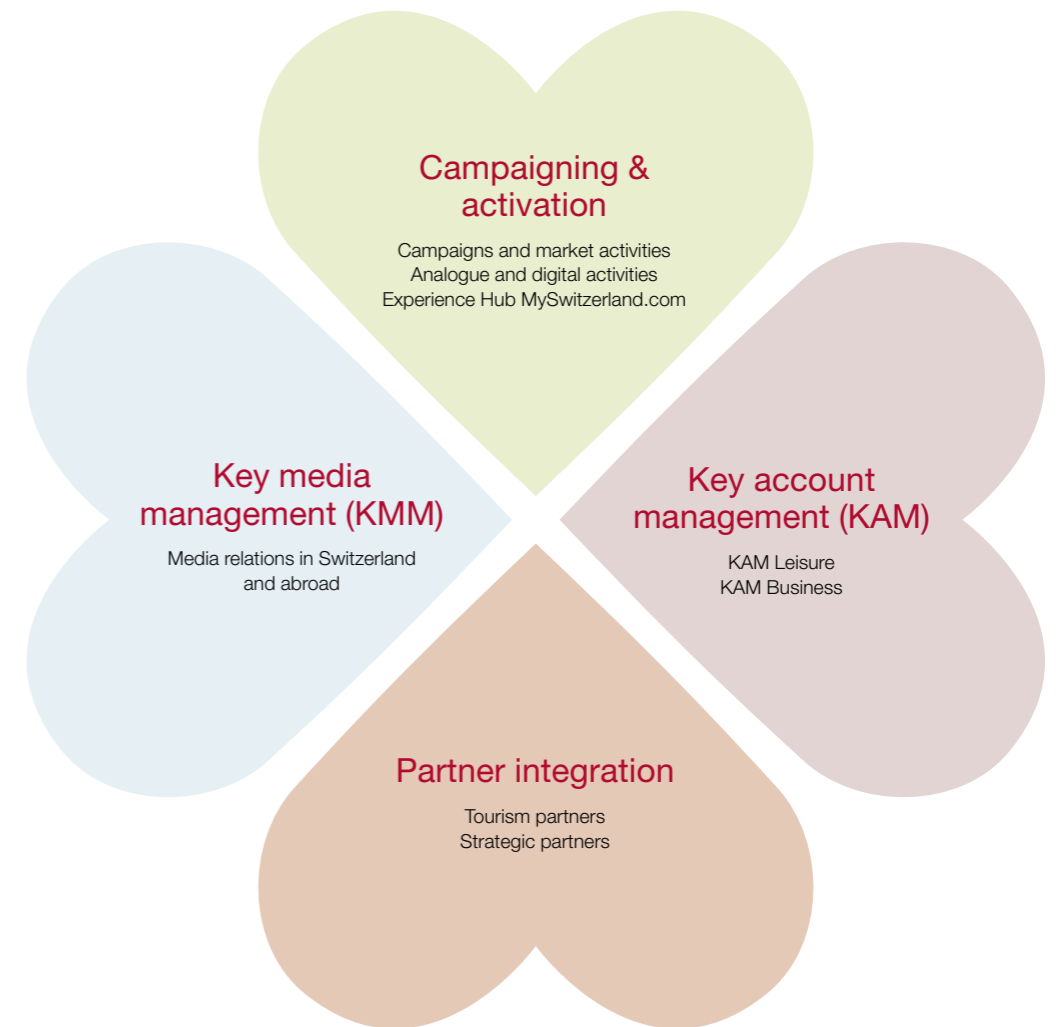
ST is hoping to achieve the following results with the personas project:



Activities

Marketing mix.

Switzerland Tourism (ST) produces high-quality, multimedia content and uses the instruments that most effectively address the defined segments and personas to present this content in the markets. Integrated marketing involves four dimensions: campaigning & activation, key media management, key account management and partner integration.



In the heart of Switzerland

Crossing the Teufelsbrücke (Devil's Bridge) by e-bike on Route 1291.

Andermatt, Lucerne, Lake Lucerne, Region, © Nico Schärer

Campaigns.

The following campaigns are produced centrally and presented worldwide. They reach the defined personas with target group-appropriate content and tailored media planning and cover various parts of the customer journey depending on the goals that have been defined.



The advertising slogan used across all campaigns remains unchanged: **“I need Switzerland.”**

Roger Federer

The long-term partnership with Roger Federer aims at attracting international visitors for an energising stay in Switzerland. The compensation for his work as ST ambassador goes to the Roger Federer Foundation, which supports disadvantaged children in Switzerland. The 2022 campaign “No one upstages the Grand Tour of Switzerland” outperformed even the tremendous success of the previous year’s “No Drama” campaign. In 2023, the Grand Train Tour of Switzerland will be showcased globally and “Touring” will continue to be promoted in foreign markets.



Discover Switzerland on a round trip



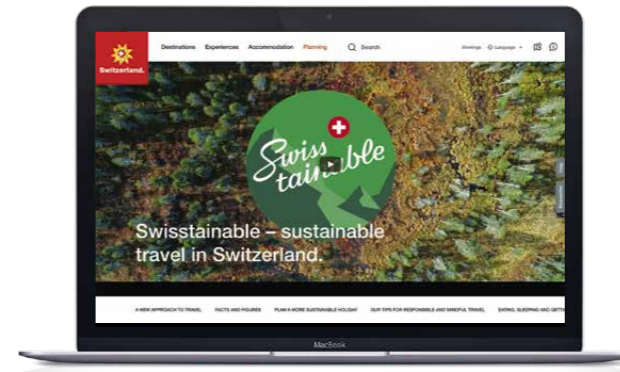
The **Grand Train Tour of Switzerland** is the ultimate railway journey through Switzerland. It combines all the famous panoramic routes in one breathtaking round trip and takes visitors to the country’s most famous sights in comfort and convenience.

From palm-fringed lakes to magnificent glaciers – the **Grand Tour of Switzerland** makes for an unforgettable road trip. Drivers of electric vehicles can set off in confidence, with a dense network of charging stations along the more than 1,600-kilometre route.

MySwitzerland.com/GrandTrainTour
MySwitzerland.com/GrandTour

Swisstainable

The Swisstainable campaign offers inspiration through stories of domestic and international travellers in Switzerland and of the “makers” in the industry. The latter deliver proof points of a sustainable change in the travel industry to visitors, while the former show that plenty of people are already opting for sustainable travel. The stories are presented for specific personas on various channels, with a focus on short-haul markets and Switzerland. Awareness of Swisstainable will also be significantly increased via a specific campaign on sustainable mobility in Switzerland.



Swisstainable: all there is to know about sustainable travel in Switzerland.



Swisstainable staging in the markets



Targets for 2023

Top marketing contacts: **3.3 billion**

Customer reactions: **11.3 million**

Marketing activities for 2023 can be found here: **stnet.ch/marketing**

Campaigning & activation

Partnership campaigns

Standardised packages across all four main campaigns (Cities, Summer, Autumn, Winter), more potential options and optimised content elements (multimedia story, short clip, key visual and print magazine) will ensure global attention again in 2023. Relevance, visibility, more impressions and more traffic – these are our shared goals.



You will find information on partner campaigns here:



Magazines

In 2023, a magazine focusing on the Grand Tour of Switzerland and Grand Train Tour of Switzerland will be published alongside the touring campaign to complement the green and white season magazines. A total of over one million copies will be printed.



Accommodation and gastronomy marketing

The new service package offers individual marketing opportunities for accommodation providers. With over 7,000 restaurants, the gastronomy platform also constitutes a major part of the activities.

Autumn goes international

2022 saw a greater focus on autumn in short-haul markets for the first time. This push included public transport passes for four days of free travel, and “nature spas”. The international promotion of autumn will be stepped up from 2023, positioning the season as the time of year that most engages the senses.



100% Women Cycling

Following the successful 100% Women Peak Challenge in 2021, a spectacular world record was achieved on the Breithorn in 2022, when more than 80 women formed the longest all-female rope team in the Alps. In 2023–2024, the aim is to establish female role models in the male-dominated world of cycling. The initiative again consists of a challenge and offers that focus on women and their interests.

Swisstainable City Splash

Following “Six in the City” in 2021 and “Run my Swiss City” in 2022, the focus in 2023 will be on the diversity of experiences in Swiss cities. “Water” has been identified as a key differentiator and is intended to help position Swiss cities in the short-haul markets and revive city tourism in the post-Covid era.



Cities campaign 2022: “Run my Swiss City”



Targets for 2023

Input by partner campaigns:

3.4 million

Satisfaction among campaign partners:

8.0

Revenue from accommodation partnerships:

2.8 million

Marketing activities for 2023 can be found here:

stnet.ch/marketing



Gen-Z winter campaign

The “snow25” and “sleep25” products developed for the Swiss market were supplemented for winter 2022/23 with the “ride&slide” campaign for young international visitors. The aim is to promote cross-border travel by public transport through attractive offers, with a renewed focus on a younger target group from 2023.

Digital customer journey.

Switzerland Tourism (ST) uses a customer journey with five phases in its digital marketing. Those who understand this customer journey know how to reach people, attract their attention, and ultimately encourage them to book and turn them into regular visitors in the long term.

The mental path to the travel destination taken by visitors – the customer journey – is something of a holy grail among marketing specialists. Those who understand “the trip before the trip” know how to reach people, attract their interest, convince them to book and turn them into real repeat customers in the long term.

There are countless concepts and ideas that describe this customer journey. For all of these, it is important that they cover the phases prior to

booking, the booking itself and the phases after booking. For each phase, the driver that actively helps the needs to be met is in the foreground.

ST uses a customer journey with a total of five phases in its marketing considerations: Awareness and Attraction are intended to call attention to Switzerland as a travel destination; Confidence and Commitment make the relevant information available prior to booking; finally, Advocacy supports tourists both during and after their holidays.

Paid, earned, shared and owned media are important terms for any digital marketing specialist. Together, these form the PESO model. Each media type serves a specific purpose in digital marketing and can be utilised differently. The interplay between the four media types is key to the success of marketing activities. It is therefore even more important to visualise how they work and to constantly perfect them.

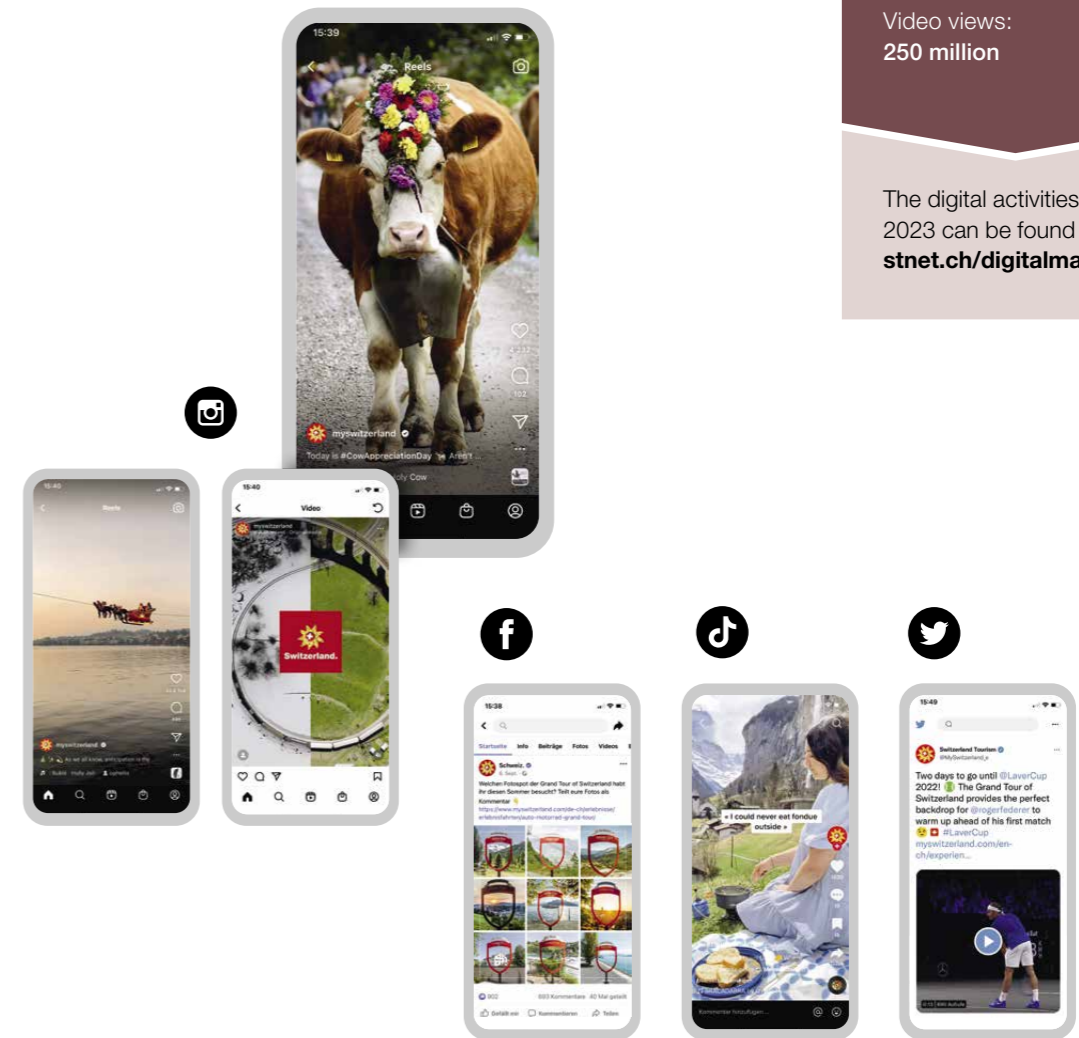
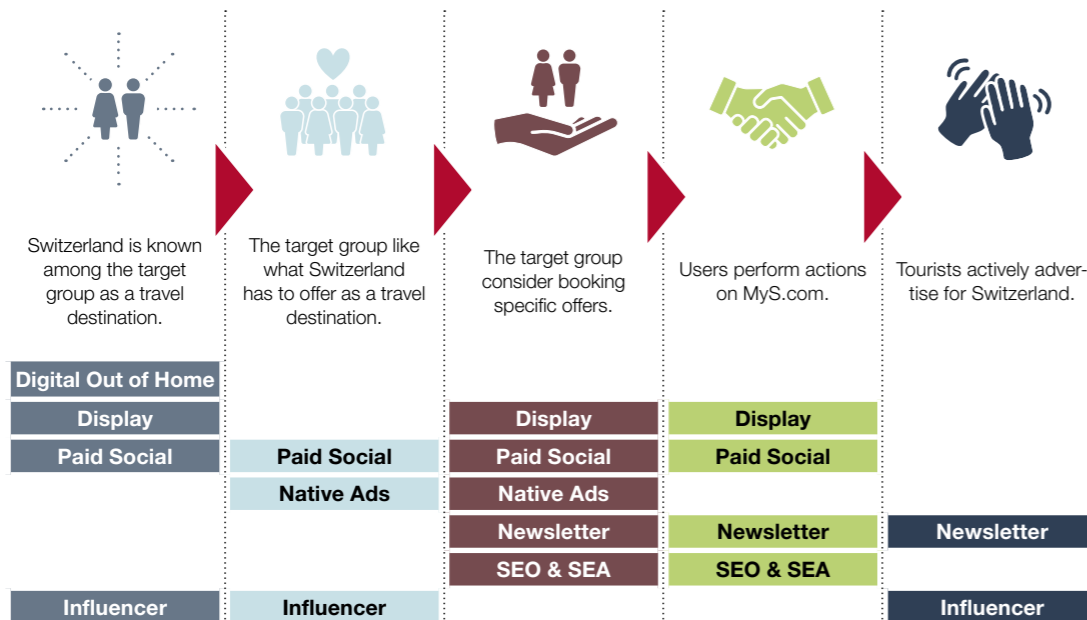


Targets for 2023

- Web visits to MySwitzerland.com: **35 million**
- Homepage bounce rate MySwitzerland.com: **34.5%**
- Engagement rate: **1.6%**
- Video views: **250 million**

The digital activities for 2023 can be found here: stnet.ch/digitalmarketing

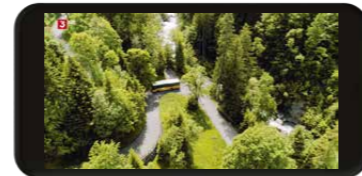
Digital customer journey (paid media)



Key media management (KMM)

Key media management (KMM) is one of Switzerland Tourism (ST)'s most efficient and influential communication instruments. The media work carried out in the 23 ST markets positions Switzerland worldwide as an attractive, high-end travel destination. The focus is on unpaid ("earned") media coverage, which visitors perceive as the most reliable. ST also has numerous communication channels of its own ("owned") and also buys ("paid") publication space in all forms of media. This is precisely selected and effectively planned based on the local media and communication landscape and draws on the in-depth market knowledge of the ST offices. ST media management takes place in close cooperation with internal and external partners to ensure the best possible media resonance worldwide.

KMM at ST consists of the head-office Corporate Communications team and the 43 media managers in the 23 markets. KMM functions as a close-knit network where knowledge is exchanged, information is shared, and mutual learning takes place based on best and worst practices. Regular KMM training supports the network beyond its day-to-day work.



In living rooms worldwide – ST's activities: SRF Tagesschau, ST Garden at the Chelsea Flower Show (UK) / 3Sat, Mit dem Postauto durch die Schweiz (in German)



© Destination Davos Klosters/Andri Flury



Switzerland features in glossy magazines and prestigious international formats: SVT, Hotel Romantik (Nordic countries) / PBS, Real Road Adventures (USA) / Volta ao Mundo (Portugal)



Targets for 2023

Top coverage articles: **3,646**

Top coverage media contacts: **4.8 billion**

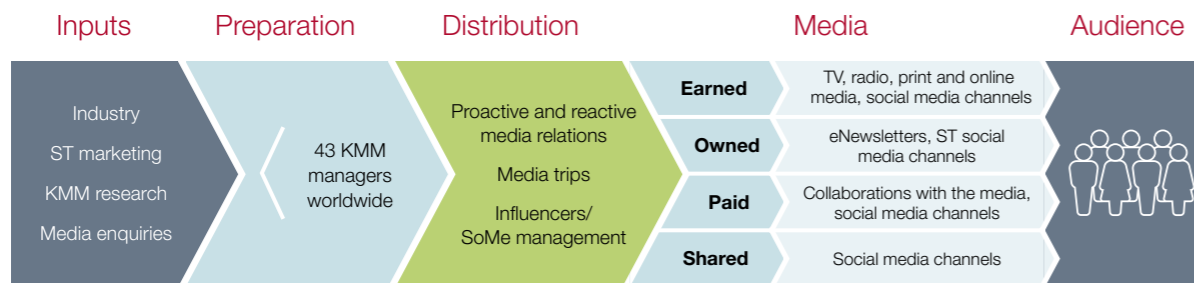
Number of qualified interactions: **12,050**

Annual report: **report.stnet.ch**

Media corner Switzerland: **MySwitzerland.com/medien**

More KMM activities for 2023 can be found here: **stnet.ch/markets**

Content journey of the key media management of ST



Global presence thanks to five billion media contacts

ST's global KMM activities lead to over five billion media contacts annually, plus over 13,000 qualified interactions with media professionals. ST welcomes around 1,000 journalists on media trips to Switzerland each year and organises around 50 media conferences worldwide. In content creator marketing, ST presents Switzerland as a holiday and travel destination to several hundred specifically selected and high-reach social media personalities from around the world each year.

New techniques, new platforms and new forms of reporting are signs of accelerated change in the media. ST makes active use of visual communication tools and social media channels and is tapping the nascent field of data journalism.

Key account management (KAM)

Switzerland Tourism (ST) cooperates closely with tour operators for leisure and business tourism worldwide. The focus of the cooperation is on sustainable products such as public transport offers. The KAM specialists in the markets maintain and expand the network of key accounts using the KAM toolbox. Qualified interactions with the travel industry are systematically planned and reviewed, measured as the newest key performance indicator (KPI).

Roadshows through the markets

The ST market teams join forces with key partner delegations from Switzerland to tour the world's most important metropolitan regions, networking with local travel industry representatives and creating excitement about Switzerland as a destination.



Trade fairs

Even in the digital world, trade fairs remain an important way to meet the key players in business and leisure tourism for successful sales talks. ST coordinates the Swiss presence at the most important global events, such as the International Travel Trade Show Berlin (ITB), the World Travel Mart (WTM) in London, and the International Luxury Travel Market (ILTM) events in Singapore, Cannes and now also Latin America.

Educational trips and workshops in Switzerland

Those who have experienced Switzerland personally will be better able to sell it in their market. That is why ST invites travel specialists from all over the world every year, so that they can get to know Switzerland as a destination and its product suppliers on educational trips and at industry workshops. From 2024, all the existing workshops will be consolidated into five different Switzerland Travel Mart (STM) formats. Besides the main STM, these are the STM Snow Edition, STM City Edition, STM Autumn Edition and STM Premium/Health Edition.



MySwitzerland Pro

To enable product managers and buyers to connect with Swiss providers and identify the right business partners within the Swiss tourism industry at any time, ST has created the digital marketplace MySwitzerland Pro. This is the equivalent to the Switzerland Travel Mart – online around the clock, 365 days a year.



Training courses

Agents' expertise in relation to the destination is a key factor in determining whether visitors choose Switzerland as a holiday destination or congress location. ST therefore trains thousands of agents around the world every year, both in person and virtually. Working alone or in conjunction with partners from Switzerland, ST-KAM specialists visit event organisers and resellers in their offices or train them in digital sales calls or topic-based webinars. Through the eLearning platform Switzerland Travel Academy, which is available in Chinese, German, English, French, Korean, Portuguese and Spanish, agents around the world can learn about Switzerland as a travel destination, deepen their knowledge in various additional modules and ultimately become certified as Switzerland experts.

Global accounts

ST enters into cross-market, multi-year partnerships with tour operators that promote and sell Switzerland as a destination in multiple markets, such as Kuoni Tumlare and The Travel Corporation (TTC) for Swisustainable. This ensures that campaign themes find their way prominently into global product portfolios, thus helping to further stimulate local providers.



Visas

Visas are an important key to markets in Asia and the Middle East, especially in the post-pandemic era. ST coordinates and mediates between visa issuers and the travel industry, so that visitors to Switzerland can start their journey without any hurdles.



Targets for 2023

Number of qualified interactions:
20,655

The current overview of KAM activities for 2023 can be found here:
stnet.ch/markets

Health tourism

ST is working with the healthcare industry to raise the profile of Switzerland as a premium healthcare destination for international patients and their families. In 2023, activities in the Gulf States focus market will be stepped up and new markets such as the UK, Central Asia and Brazil will be developed. China will be activated as soon as travel to Europe picks up again. In addition to networking events, media relations and webinars in target markets, educational trips to Switzerland and the annual STM Health event are also planned.



Business travel is on its way back.

After having collapsed entirely during the pandemic, the meetings industry is fighting its way back with new realities. Together with the Switzerland Convention & Incentive Bureau (SCIB), Switzerland Tourism (ST) is focusing on acquiring business events.

Business tourism is changing – not only because of new opportunities to meet virtually, but also because of shifts in society. New work formats and models and more conscious (travel) behaviour are greatly influencing not just individual but also organised business travel. These changes offer opportunities for business events and open up new potential in areas such as “bleisure”, i.e. extending business trips to include private stays. Safety, reliability and sustainability have become key considerations when choosing a destination. Formats are also changing permanently. Smaller groups are meeting for longer periods in more exclusive settings. Switzerland can score highly in these areas, as well as with its accessibility and unique proximity to nature, where participants can recharge.

Increasing “field time”

Following some changes and upheaval on the customer side, ST is stepping up its physical market presence by focusing on new potential customer firms in the markets and raising Switzerland's visibility with its existing base.

Digitalisation

The digitalisation of internal processes and industry-relevant data will continue to be driven forward (such as offer preparation, a new CRM system, a destination dashboard for planned and completed events, etc.).

Digital recovery campaign

A multi-year digital campaign is to increase the previous reach several times over. It is being rolled out worldwide, using a targeted and witty approach to activate business events run by potential organisers in Europe, North America and Asia by grabbing

their attention. ST will address and support these organisers throughout the customer journey in accordance with their particular needs, right through to the point at which definite offers are made. The potential customers will be integrated into the markets' proven KAM activities as leads.



Meeting design

People who meet in person want to allow a lot of space for interaction in particular. In addition to professional infrastructure, new meeting formats require exceptional group spaces that promote dialogue and enable shared experiences. Interested parties can find such venues, located within or close to convention centres and conference hotels, along with sustainable team activities and tips for holding targeted meetings on MySwitzerland.com/meetings using the search/filter function.

Swisstainable business events

Switzerland establishes itself as a leading destination for sustainable business events. A flagship conference that considers and implements all aspects of sustainability is presented in a case movie as an example of best practice and portrayed as setting a new standard. MySwitzerland.com/meetings also highlights especially sustainable initiatives and examples of conference hotels, convention centres, venues, social programmes and transport options.



Bleisure travel

Business events can be leveraged to win additional leisure visitors. One-third of attendees extend their stay privately before or after an international business event, and that number is growing. This presents an opportunity for hotels and destinations to extend their business visitors' stays, attract additional leisure visitors, and sell offers and experiences, thus adding additional value and making an important contribution to sustainability.

Destination Weddings

Destination Weddings are growing in popularity around the world. More and more couples are choosing to turn their wedding into an opportunity to spend a few days somewhere romantic with family and friends from all over the world. Wedding planners see Switzerland as a dream destination for couples: in summer or winter, in cities or the mountains. Content from MySwitzerland.com/weddings is communicated through social media, key B2B platforms and media relations activities.



Targets for 2023

Inquiries handled:
845

Business events held:
323

Tourism turnover:
59.7 million

Number of qualified interactions:
8,930

Activities for 2023

The marketing concept, market situation, activities and targets for each market can be found here: stnet.ch/meetings

A strong partner for the industry.

Stronger together. Switzerland Tourism (ST) collaborates closely with the Swiss tourism industry and coordinates its international marketing with it under the strong Switzerland brand.

ST's partner model

ST integrates around 1,200 partners in the industry, comprising regions, destinations, railway companies, hotels, conference and seminar providers, non-hotel accommodation providers as well as leisure activity providers in its marketing activities in the 23 markets. This effective and pooled use of resources is a major strength of the Switzerland tourism brand.



Partnerships

ST cooperates closely with industry and corporate partners. The partnerships are mutually beneficial and based on agreed, measurable goals. To ensure effective use of resources and maximum impact in the markets, ST expects the following partner investments:

	Actual 2021	Forecast 2022	Budget 2023
Membership fees	2.3m	2.4m	2.4m
Marketing contributions from tourism partners	24.1m	24m	26m
Corporate partners, including barter	6.2m	8m	8.1m

Events as a networking platform

ST is committed to actively involving the tourism partners and offering them appropriate platforms for their marketing activities. To promote the international tour operator network and foster dialogue within the tourism industry, ST organises innovative, high-quality events through its newly formed events department. Vacation Day 2023 in Interlaken will set a new standard with a revamped concept.

"Rexit": the post-recovery era begins

2023 is the last year in which additional recovery funds will be provided to ST and the tourism industry. Following the time-limited relief provided by the federal government, partners are invited to participate in ST's campaigns and market activities using their own resources again.

Corporate partners

ST integrates corporate partners into international marketing by means of official, strategic and premium partnerships, thereby securing a substantial portion of its financial resources and increasing the scope of its activities. ST offers its partners attractive marketing platforms and focuses on tailor-made offers and finding the perfect fit in terms of brand, target group and theme.

Tourism partners

ST will continue to strengthen its relationship with its tourism partners. One specific measure is "ST on Tour", which will see an ST delegation visit every region between now and autumn 2023 for an exchange of ideas.



Targets for 2023

Satisfaction among tourism partners:

8.0

Satisfaction among corporate partners:

8.0

Satisfaction level for Switzerland Vacation Day 2023:

8.0

An attractive employer.

Switzerland Tourism (ST) fosters an open, direct and performance-oriented corporate culture with flat hierarchies and fast, agile communication and decision-making channels. ST draws on the best talent to tackle the complex, challenging tasks it faces.

Focus on employees



Recruitment

We consistently recruit employees who best match a clearly defined requirements profile. We prioritise personality, training and experience.



Employee management

We treat our employees with respect, challenge them with ambitious goals, give them confidence and enable them to achieve the best possible performance.



Employee development

We empower and encourage employees who are committed, think independently, act entrepreneurially and achieve their goals. We facilitate personal development and international careers.

Diversity

Maximum productivity and creativity are achieved in diverse interdisciplinary teams. ST aims to harness differences to achieve success and promote diversity in the organisation. For this purpose, ST fosters a balanced mix of men and women, international personnel and Swiss employees from all four language regions, local and transferable staff, older and younger people, and people with different views and lifestyles across all hierarchical levels.

OCOS: One Company One Spirit

ST has launched the OCOS project to promote and embed its corporate culture. This involves developing a shared understanding of what constitutes the ST corporate culture and how it should evolve in the future.

The purpose “We proudly promote Switzerland” and the four core values “passionate”, “cooperative”, “open-minded” and “entrepreneurial” have been defined in consultation with employees. A gap analysis was carried out to identify specific action areas that four diverse sprint teams are now working on, deriving measures that ST can implement to further support its culture.



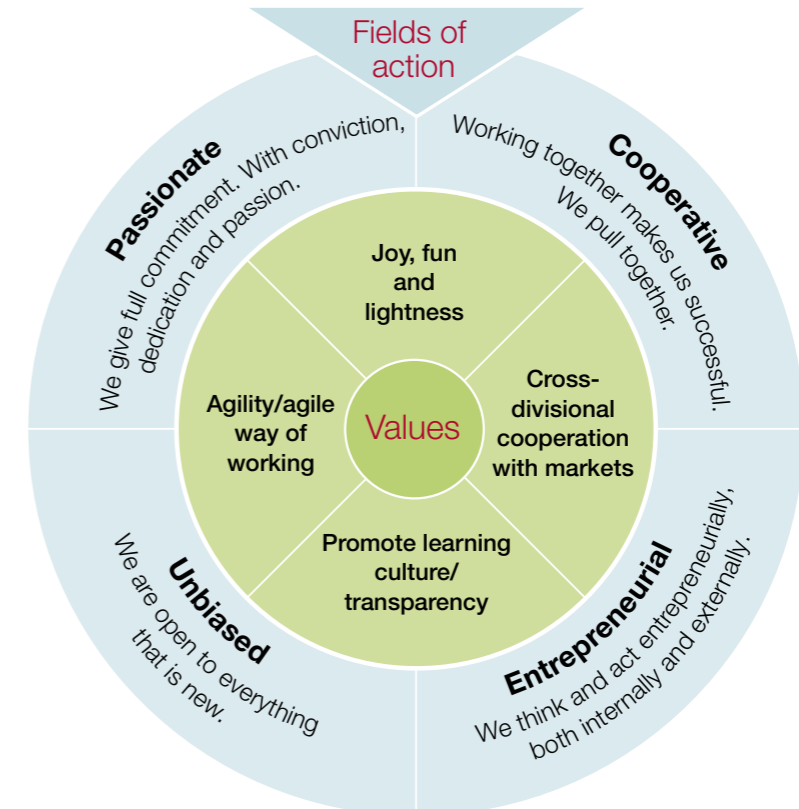
Targets for 2023

Employee fluctuation:
9–15%



More about ST as an attractive employer (in German and French only):
stnet.ch/karriere

Purpose: We proudly promote Switzerland.



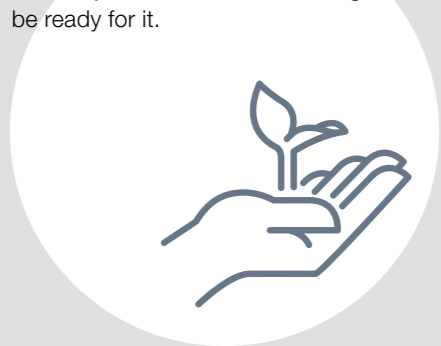
Five things that I wish for from the tourism industry.

Martin Nydegger shares his expectations and reveals what will really count over the next few years: “A great product is the best marketing. This fundamental truth makes it imperative that the industry works hard on the product and offering.”



1 Become Swisstainable.

The Swisstainable initiative is gathering momentum. There are already some tour operators who work exclusively with Swisstainable businesses. Visitors are interested in this topic and are enquiring about it. Swisstainable is a meaningful programme with very low barriers to entry. Made by the industry for the industry. If you are not yet on board, get signed up today so you're fit for the future. Swisstainable may soon become a booking criteria – be ready for it.



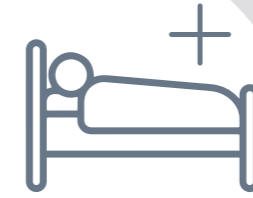
2 Adopt more flexible opening hours and dates.

If visitor volumes are staggered, rather than them all visiting us at once, everyone benefits. Visitor flows are more evenly distributed, and hosts can keep their quality high. To help year-round tourism take off, visitors need to be willing to travel outside the high season. And, of course, the industry needs to be willing to open outside the high season. Already, businesses with long opening periods record good occupancy rates in autumn. Greater flexibility is still needed, however, notably in the spring. Extend your seasons and prepare to welcome visitors with open wallets all year round!



3 Keep visitors for longer.

Those who stay longer delve deeper. It is only logical that, having courted our visitors at great expense, we want to keep them for as long as possible. ST cannot accomplish this task alone; it needs everyone's cooperation. There are many reasons to stay longer in Switzerland – let's promote them. Create offers and stories that will tempt people to stay for several days. This is a creative task for the entire industry that is sure to deliver a lucrative and immediate pay-off.



4 Actively shape the market mix.

“Don't put all your eggs in one basket” is the simple and effective rule. And this applies to tour operators, hoteliers and operators of cable cars and mountain railways just as much as it does to farmers. When I ask tourism experts about their market mix, I receive detailed statistics about the origin of visitors, which reflect the status quo. I would like to encourage you to take a forward-looking approach and define and actively work for a target market mix that is right for you. For Switzerland as a whole, ST defines the target mix as 45-35-20 (domestic, short-haul and long-haul markets). However, the mix is different for each tourism business. We will be happy to support you with your marketing!



5 Offer a premium service.

Production costs are rising due to inflation, energy prices and supply bottlenecks, making the tourism offering more expensive as a result. Higher prices also mean that guests have higher expectations, and rightly so! It is therefore crucial that product and service quality in Switzerland is not merely average but above average. Go the extra mile to fulfill guests' wishes and exceed their expectations, as this is the only way to justify the higher prices.



Impact is key.

With controlling, the ST journey (see page 9) is brought full circle. Switzerland Tourism (ST) measures the impact of its own performance and defines appropriate measures aimed at improving its marketing activities even further.

The tasks facing ST within the framework of the federal mandate are outlined in the Agreement on Political Controlling, Reporting and Monitoring between SECO and ST. ST regularly produces the necessary key figures and evaluations required for reporting. In addition to the key performance indicators described on pages 26–27, and which measure in particular the outputs and outcome of ST activities, ST also carries out in-depth studies that evaluate its long-term impact.

Tourism Monitor Switzerland (TMS)

Tourism Monitor Switzerland (TMS) is the biggest national visitor survey. Every four years, it gathers information from over 21,000 holidaymakers from over 100 international markets about their travel habits. The field work for the next TMS will run until autumn 2023. Based on the TMS, an **impact measurement** will be conducted on behalf of SECO to evaluate the effect of ST's marketing activities on overnight stays and revenue. The next impact measurement will be published in summer 2024.

Brand Equity Monitor (BEM)

In addition to the TMS, a representative online survey that also covers non-visitors was carried out for the first time in 2021. The aim of this survey, which has to date questioned 5,000 people about their summer holidays, is to measure the tourism image, marketing funnel, drivers of and obstacles to travel, and ST campaigns, by comparison with other tourism destinations. The BEM focuses on the markets of Switzerland, Germany, France, UK and USA. It will next be carried out in September 2023, when it will be extended to further countries of origin.

Management Information System (MIS)

The MIS covers various ST campaign dashboards, which link different data sources to one another. In this way, ST is able to measure the progress towards achieving tourism goals and to decide – based on data relating to overnight stays, bookings and web

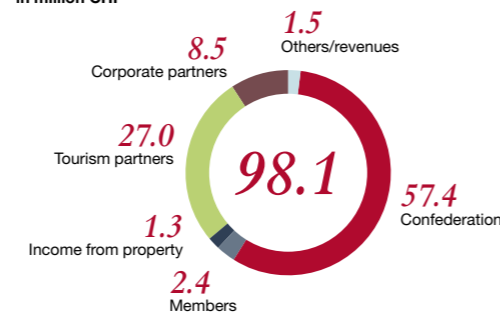
visits, Google trends, data from TMS and other sources – with which content it should invest in which markets. Most of the dashboards are also available to the tourism industry on STnet.ch.

Partner reporting

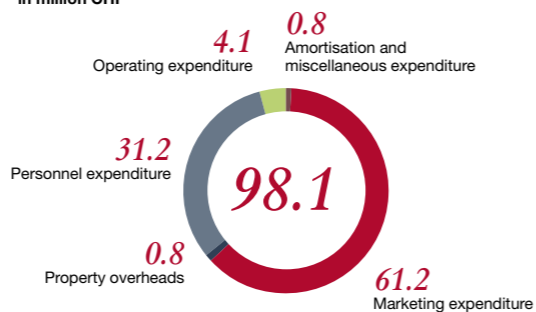
ST draws up a full report on the activities with its partners. The insights drawn from this are used to improve activities and increase benefits for partners.

How ST is funded

Annual budget 2023* in million CHF



Budget spending 2023* in million CHF



*without recovery funds 2023



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Strategic premium partners



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raiffeisen.ch



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