

Switzerland Tourism.



# Strategy and planning.



2024–2026



# “Guiding the right guests to the right place at the right time.”



**Martin Nydegger**  
CEO Switzerland Tourism

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Welcome to my dream scenario for 2030: we witness a Switzerland that is flourishing and experiencing a veritable tourism revolution. The population has realised that hospitality and a welcoming attitude open the doors to a bright intercultural future. Guests visit the country all year round. Autumn has become a peak season all of its own, in regions like Ticino well into November. The destinations have done a great job ensuring that there are enough businesses open at all times of the year. The duration of guests’ stays has also increased by a full 50% – since Switzerland demands to be explored extensively. The Swisstainable programme can be found everywhere you turn and has long since exceeded 7,000 participating companies. Switzerland is regularly named “the world’s most sustainable travel destination” and is a shining example of progressive sustainability and the power of hospitality.

True, this is all wishful thinking – and yet we are well on the way to achieving it. Let us share with you where our current path is taking us.



Where togetherness leads to uniqueness.  
A visit to 100% Valposchiavo.



# Seven key factors

This strategy paper serves Switzerland Tourism (ST) and the entire industry as both a guide and a source of inspiration for actively shaping the future. There are seven key factors here that are intended to ensure success:

## 1 Partnership



### ST facilitates success

ST interacts with its partners in a professional way and builds trust. The marketing and market platforms are characterised by creativity and high standards that are appreciated and actively used by partners.

## 2 Trust



### ST is committed to reliability

In this era of artificial intelligence and easily accessible online platforms, websites and social media channels, people long for trusted sources of information. ST accepts its responsibility in delivering 100% trustworthy and reliable tourism content. The official status of ST and Switzerland's strength as a destination brand stand for reliability and are the basis for this trust.

## 3 Innovation



### ST is becoming even more productive and creative

Despite tight budgets following an end to federal recovery funds, ST is committed to achieving maximum impact. It's all about setting priorities, increasing productivity as well as creativity, and shining with innovation and originality.

## 4 Sustainability



### ST is committed to Swisstainable

The transition to sustainable tourism requires both time and financial resources. A strong tourism sector is essential in order to finance this change. Swisstainable is admired internationally and appreciated nationally. It is guiding Swiss tourism towards a sustainably successful future.

## 5 Steering



### ST evolves from promoting to steering

Addressing target groups in a nuanced and precise way is a crucial part of tourism marketing. ST is increasingly focusing on directing the flow of visitors so that they feel entirely at ease and experience all of Switzerland as the perfect host.

## 6 Year-round tourism



### ST spreads activities throughout the year

Statistically speaking, more than half of all hotel rooms are left empty throughout the year. In a move designed to optimise utilisation, ST spreads its activities and campaigns out evenly throughout the year, thereby promoting year-round tourism.

## 7 Traveltech



### ST aims to shape the future in Web 3.0

The rapid development of the digital world requires ST to stay on top of things on behalf of the tourism industry. ST evaluates new technologies as they emerge and stays at the forefront of new developments such as artificial intelligence (AI), virtuality or block-chain in an effort to pave the way to Web 3.0.

The abbreviation ST is used to refer to the Switzerland Tourism organisation in this brochure.

# Economic context

## Economic context analysis

To be successful in tourism, you need to keep a close eye on the global economy, both now and in the future. Everything impacts on tourism, from political conflicts and natural disasters to pandemics and economic conditions. The latter is becoming particularly important as the global economy looks set to embark on an exciting journey over the next 24 to 48 months.

### Assessing the global economy

For 2024, year-on-year global economic growth is forecast at 2.5% (see chart). There are clouds on the horizon, however, in the form of continued inflationary pressures and a more restrictive interest rate policy by the FED and the ECB. The costs of consumer goods and services will rise once more, and wages will not follow suit at the same pace and to the same extent. On the other hand, we are set to see positive developments in the form of lower energy prices and the normalisation of the value chains.

### Business is booming in the East

- The economies of Southeast Asia, the Gulf States and India are going through the roof.
- China and Japan, on the other hand, are somewhat lagging behind. The Chinese economy has lost momentum.

### The West is flourishing

- The US economy has proven itself to be robust, and recession seems unlikely.
- Interest rate hikes, on the other hand, are curbing growth slightly.

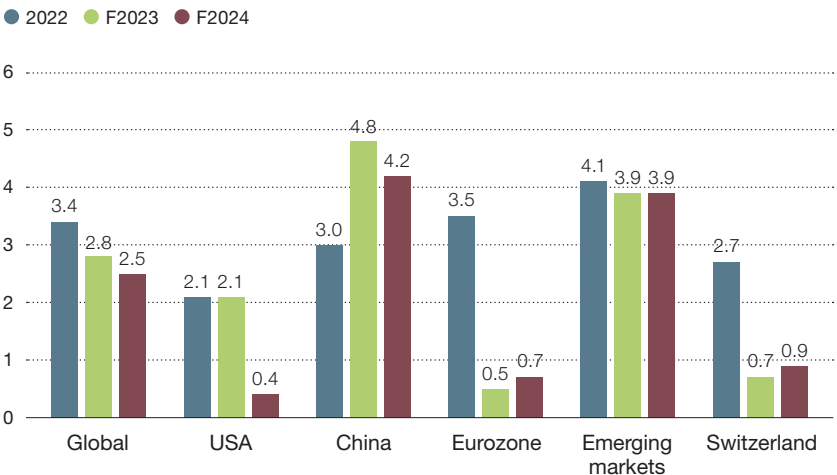
### Europe is flagging

- Higher inflation and continuously rising interest rates are likely to lead to below-average growth in the eurozone.
- Thanks to greater energy security, the eurozone has been able to avoid a deep recession.
- The war in Ukraine can quickly and significantly influence framework conditions.
- Germany is limping along (due to political turmoil and a loss of industry to China).

### Switzerland is groaning

- The industrial and service sectors are affected by lower level of orders and a drop in utilised capacity.
- Ongoing rent increases and rising health and energy costs are putting pressure on household expenditure.

GDP growth of major economies, with UBS forecasts (F) as a percentage



Dances with herbs.  
The secrets of wild Valais herbs.

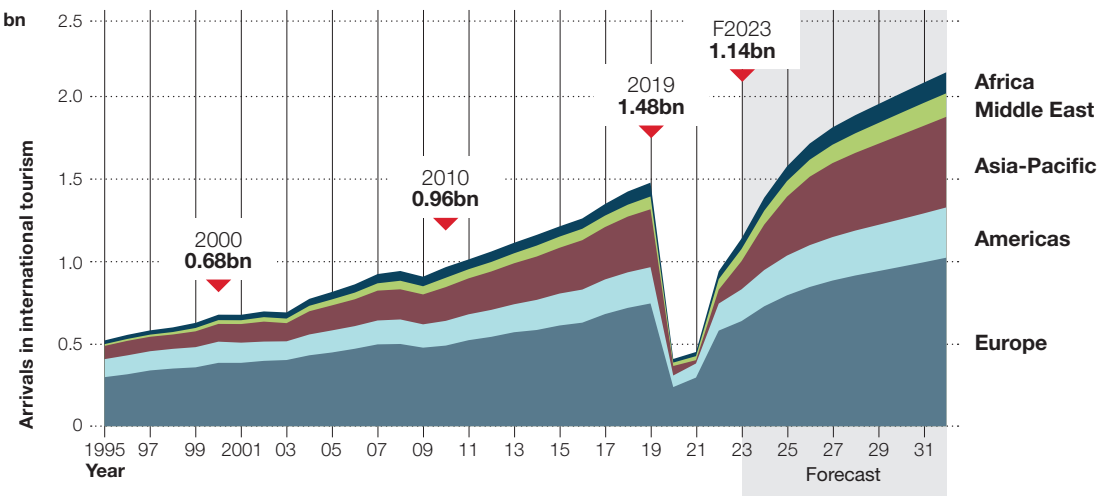


Tourism development worldwide

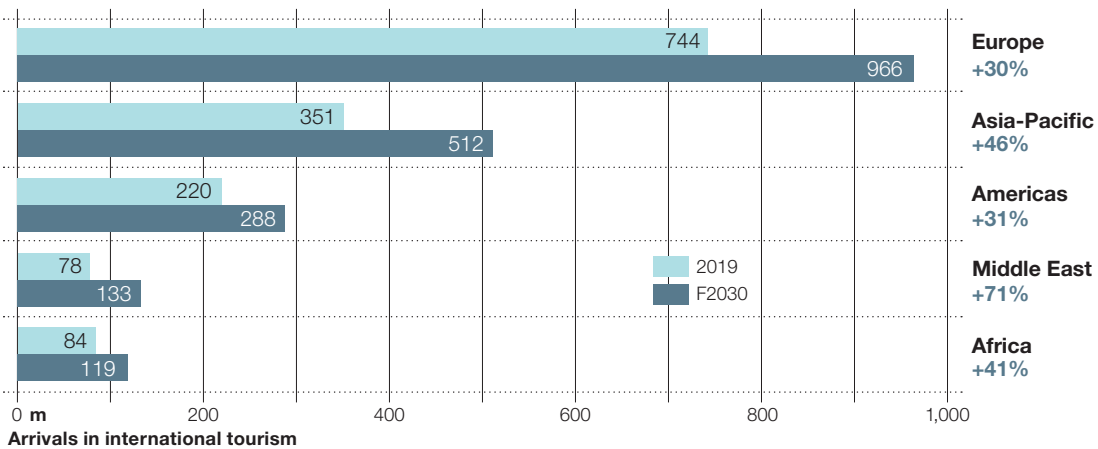
Global tourism forecasts

The UNWTO and Oxford Economics predict an impressive increase in global tourism patterns (see chart below). Although the coronavirus pandemic has put a historic damper on the industry, it has not put a stop to people’s desire to travel, but rather simply delayed it. Europe remains the world tourism champion in absolute terms.

Impressive global growth following on from the pandemic slump¹



Asia-Pacific is growing more quickly than Europe¹



1 Source: Oxford Economics (June 2023)

Tourism on all continents worldwide is expected to grow by around 36% between 2019 and 2030, with Europe and the Americas remaining behind the curve with an increase of around 30% (approx. 3% per year), below the market average. The momentum of the Asia-Pacific market is particularly noteworthy, with above-average growth of 46%. There is a long-

term shift in tourism patterns from the “old” tourism regions to competitors in the (Far) East. This change is also evident in other economic indicators. It is becoming apparent that the economies of the future will be of Eastern and Asian origin, as there is a much greater hunger for success in these regions, which ensures momentum and is rewarded with growth.

Interpretation for Switzerland

Global tourism is currently experiencing encouraging growth, but this varies from region to region. Effective marketing is essential throughout this growth phase for three reasons:

Utilisation of capacity

There is still a lot of untapped potential! The average hotel occupancy rate for an entire year is less than 45% in Switzerland. Even if the number of hotel overnight stays were to increase by 2–3% year-on-year until 2030, nearly every second hotel room would still remain empty.

Steering

Steering the flow of visitors is gaining in importance. Uncontrolled growth can be harmful and quickly amass negative consequences. Intelligent tourist marketing is key in controlling the flow and behaviour patterns of visitors.

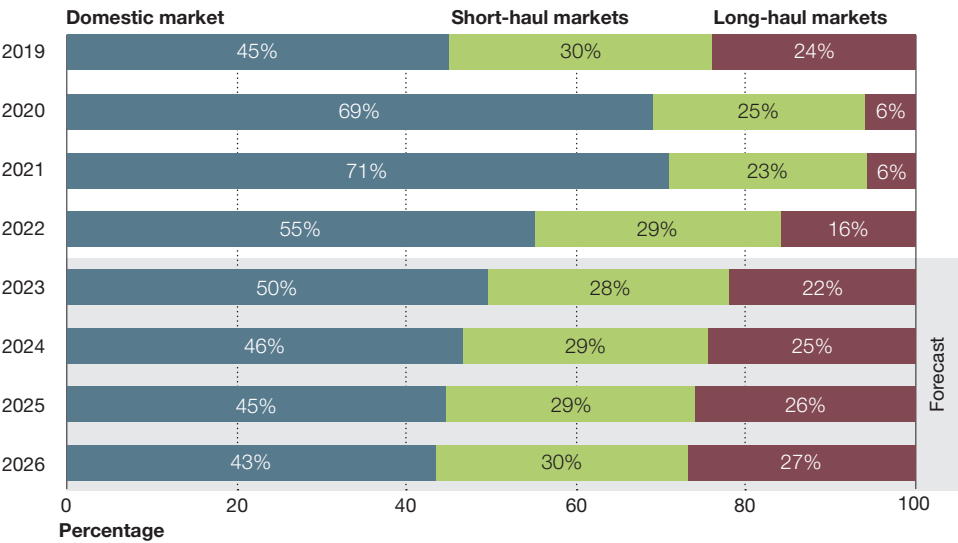
Competition

Competition is fierce! Global competitors are offering more affordable options and are expected to grow more quickly than Switzerland as a premium destination.

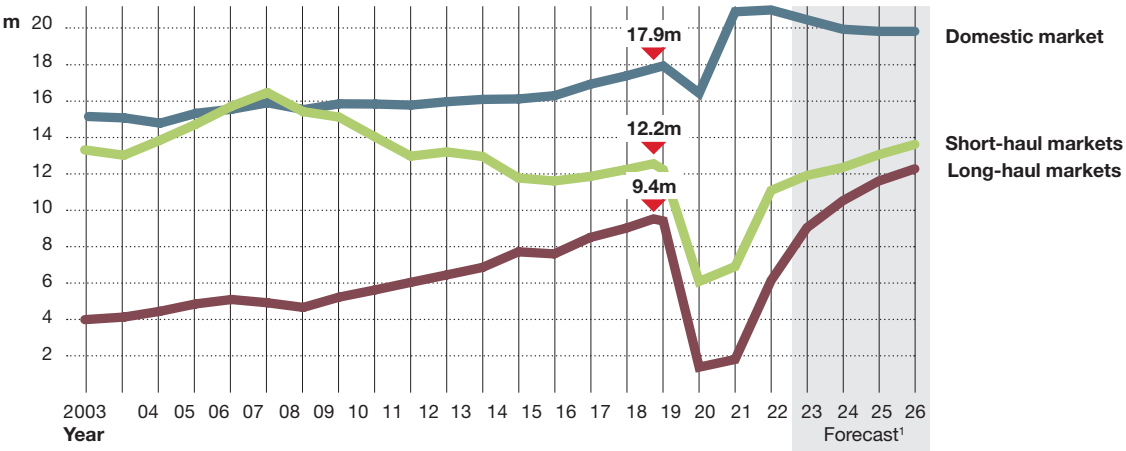
Development of ST markets

The pandemic has led to a significant change in market distribution, with a clear trend towards more domestic guests.

Development of market distribution for 2019–2026



Development overnight stays 2003–2026



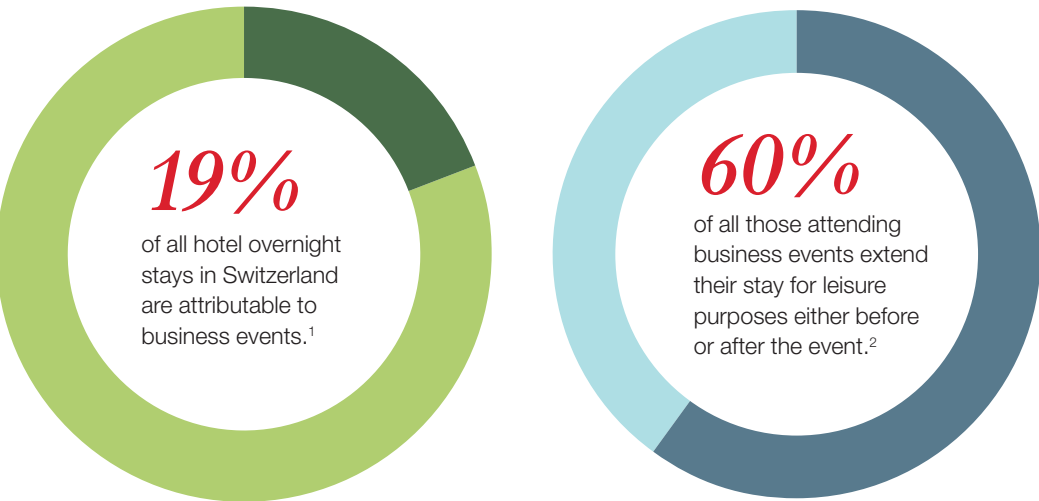
1 ST's estimates, based on data from the Swiss Economic Institute at the ETH Zurich (KOF) and Oxford Economics, November 2023

Although the number of hotel overnight stays by domestic guests is likely to decrease slightly between 2024 and 2026, it is expected to stabilise at a higher level than before the pandemic. Regions that benefited from an increase in Swiss guests during this period may experience lower growth in future years. Hotel overnight stays from short-haul

and long-haul markets have recovered rapidly since the pandemic and are expected to reach pre-pandemic levels in 2024. This positive trend is expected to continue over the coming years. Overall, the total number of overnight stays in all markets is expected to see a steady increase between 2024 and 2026.

Business events

Organised business tourism (business events) is developing well. Demand for conferences, meetings and incentive trips via the Switzerland Convention & Incentive Bureau (SCIB → p. 46) should return to 2019 levels by 2026.



1 Source: Meetings statistics and hotel overnight stays for 2019  
2 Source: MMGY Travel Intelligence

# Business intelligence

ST uses business intelligence to proactively monitor economic conditions and the tourism sector. The relevant information, data and findings are continuously processed in the Management Information System.

The economic and tourism information and data are derived both from public sources such as hotel statistics and from our own market research studies. In particular, ST's key surveys include the Tourism Monitor Switzerland (TMS) and the Brand Equity Monitor (BEM). The data obtained as a result enables ST and the tourism industry to identify trends at an early stage and make well-founded decisions.



**Tourism Monitor Switzerland (TMS)**  
The 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. Based on the TMS, an **impact measurement** is produced on behalf of SECO to measure the impact of ST's marketing activities on overnight stays and turnover. The results of the latest TMS survey will be published in the summer of 2024.



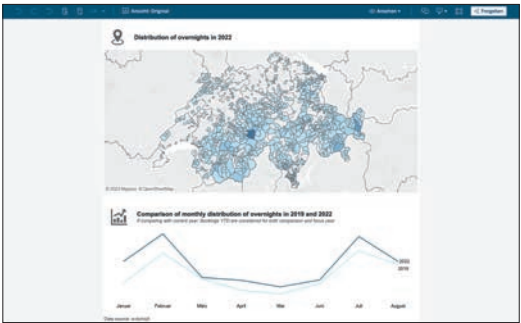
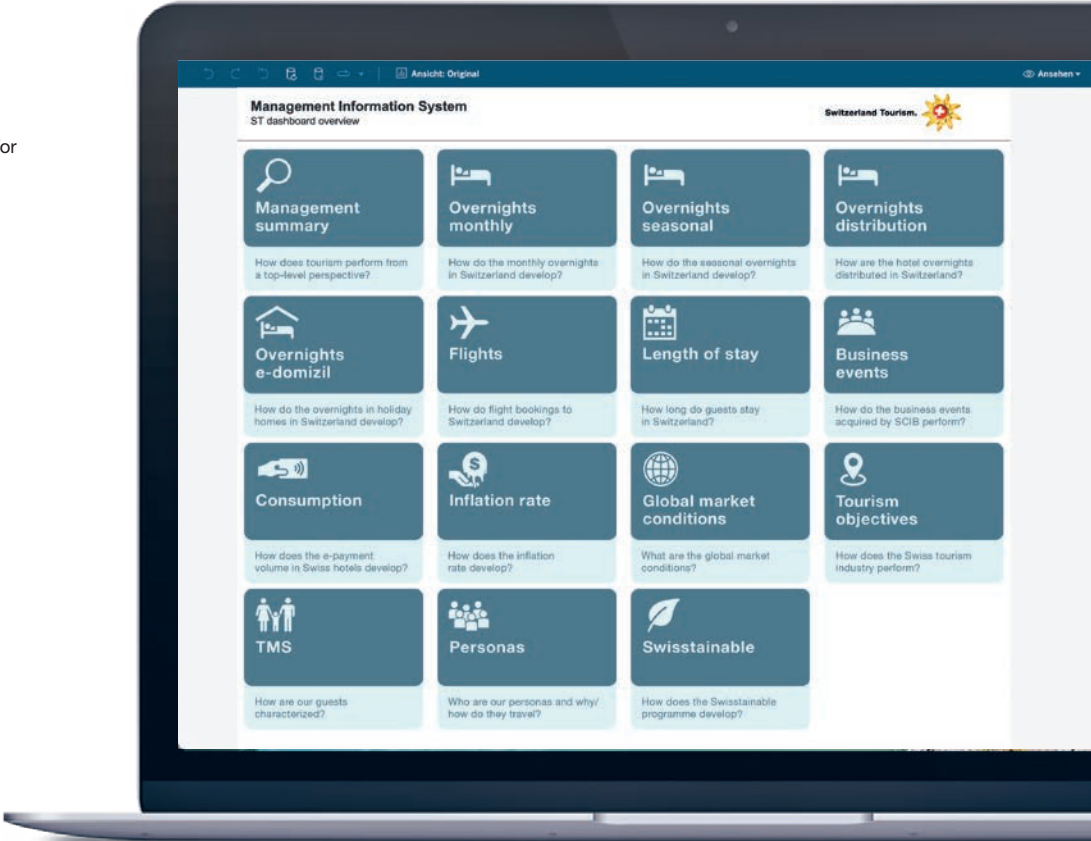
**Brand Equity Monitor (BEM)**  
In addition to the TMS, a representative online survey that also covers **non-visitors** was carried out for the first time in 2021. The aim of this first survey, which questioned 5,000 people about their summer holidays, was to measure the tourism image, marketing funnel, drivers of as well as obstacles to travel when compared with other tourism destinations. The BEM focuses on the markets of Switzerland, Germany, France, the UK and the USA. The survey was most recently conducted in September 2023 and was extended to other countries of origin. The results will be published over the course of 2024.

## Management Information System (MIS)

The MIS offers a wide range of dashboards that can seamlessly link various data sources to one another. This allows information to be analysed more comprehensively and visualised more clearly, thereby aiding in strategic planning and sound decision-making.



MIS access for ST members

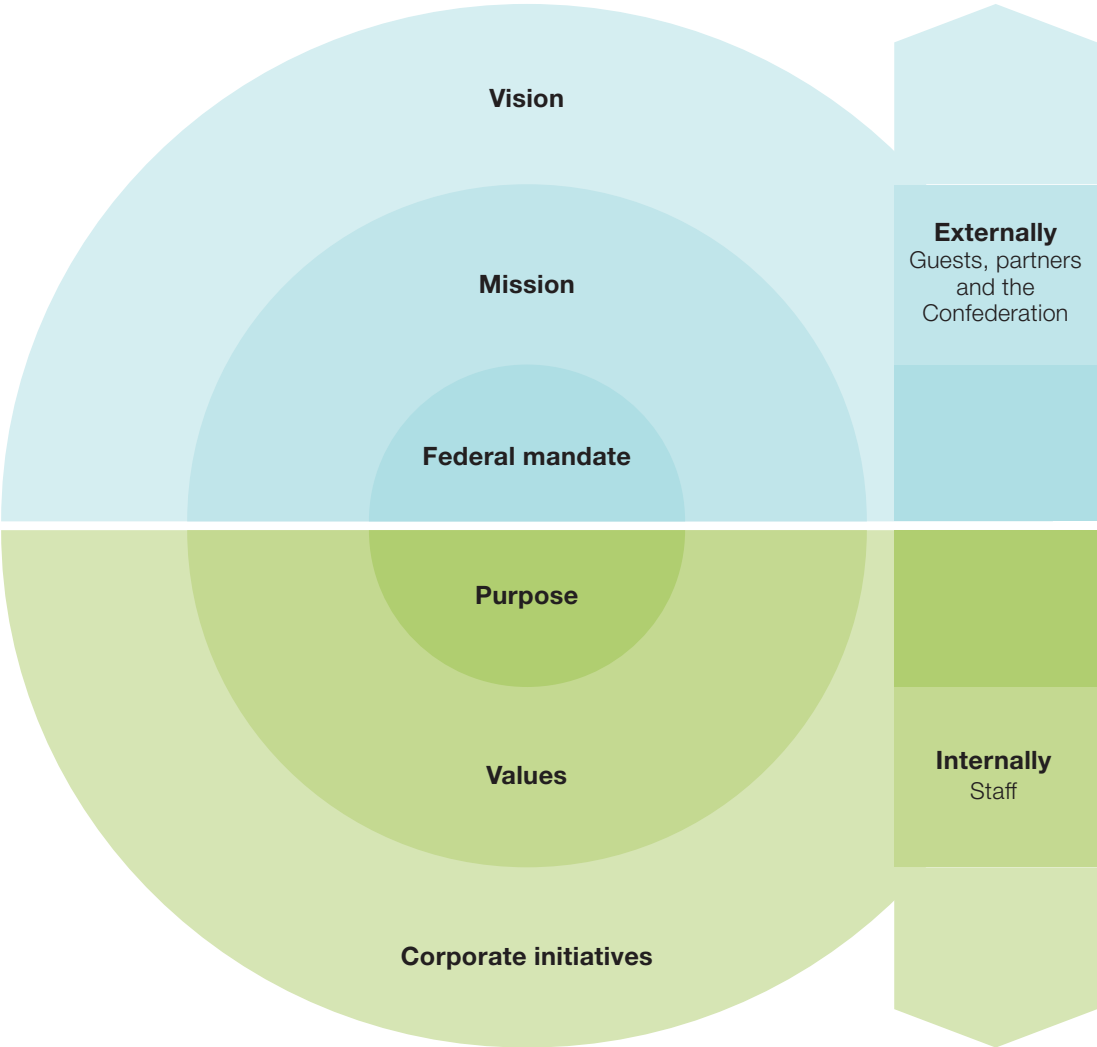




# Strategy 2024–2026

## Guiding principles

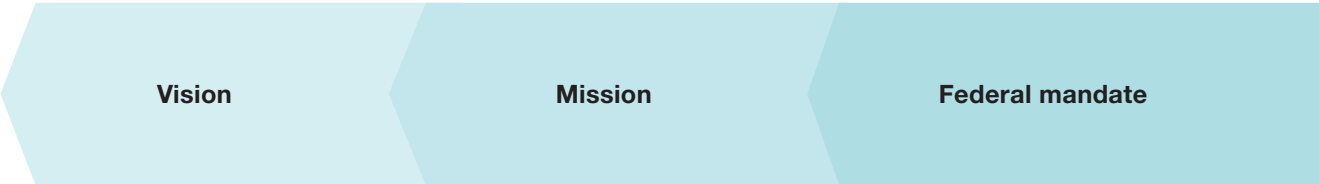
The guiding principles provide the basis for the orientation and implementation of the strategy. The federal mandate, the mission and the vision shape ST’s long-term promise to guests, partners and the Confederation. The purpose, the values and corporate initiatives shape corporate culture at ST and guide the decisions of employees.



**Alongside the water.**  
Explore the countryside by e-bike, stroll through the city or take to the water on a hired SUP.

Wohlen near Bern, Bern, © Christof Schürpf



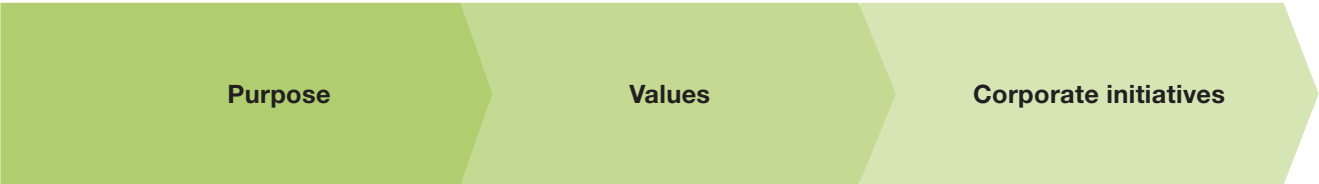


Guiding principles  
Externally

Tourism is thriving throughout Switzerland. Switzerland as a tourism destination is a global “love brand” and a pioneer with respect to sustainable tourism.

ST seeks to create a desire among guests for sustainable travel in Switzerland and offers its partners effective platforms.

- Basic role**  
ST has overall responsibility for tourism marketing for Switzerland as a whole both at home and abroad.
- Role in promoting cooperation**  
ST encourages the tourism industry to a joint presence in the market, and coordinates efforts.
- Advisory role**  
ST proactively shares the insights from market research and observation with its members.



Guiding principles  
Internally

“We proudly promote Switzerland”: this principle was defined by ST staff during the course of the OCOS project with the aim of enshrining corporate culture.

- Passionate**  
We demonstrate our commitment.
- Without bias**  
We are always open to new development and ideas.
- Cooperative**  
We all pull together.
- Entrepreneurial**  
We think and act with an entrepreneurial mindset.
- Conscientious**  
We are aware of our ecological and social responsibilities.
- Digital**  
We practice a “digital first” policy.
- Joy, fun and ease**  
Continuous events that strengthen team spirit and lighten the daily work routine.
- A culture of learning and transparency**  
Regular exchanges on activities and projects within the company.
- Agility**  
Use of agile working methods and training on agile work practices.
- Interdisciplinary cooperation**  
Encouraging interdisciplinary teams in order to promote the exchange of information and cooperation.
- Sustainability measures**  
Implementing environmentally friendly office and travel practices.
- Tools**  
Using digital tools to increase efficiency and quality.

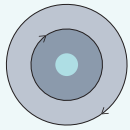
**OCOS: One Company One Spirit**  
ST has launched the OCOS project to promote and embed its corporate culture. This involves developing a shared understanding of what constitutes the ST corporate culture and how it should evolve in the future.



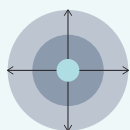
# Strategy wheel

The strategy wheel is used to visualise the strategic goals and fields of action that guide ST’s activities.

**Key**



The strategy wheel follows the logic of a hub – goals and fields of action are not given fixed assignments.



The guiding principle is at the core of the strategy wheel, which is read from the inside out.

1

**Vision, mission, federal mandate**  
→ p. 15–16

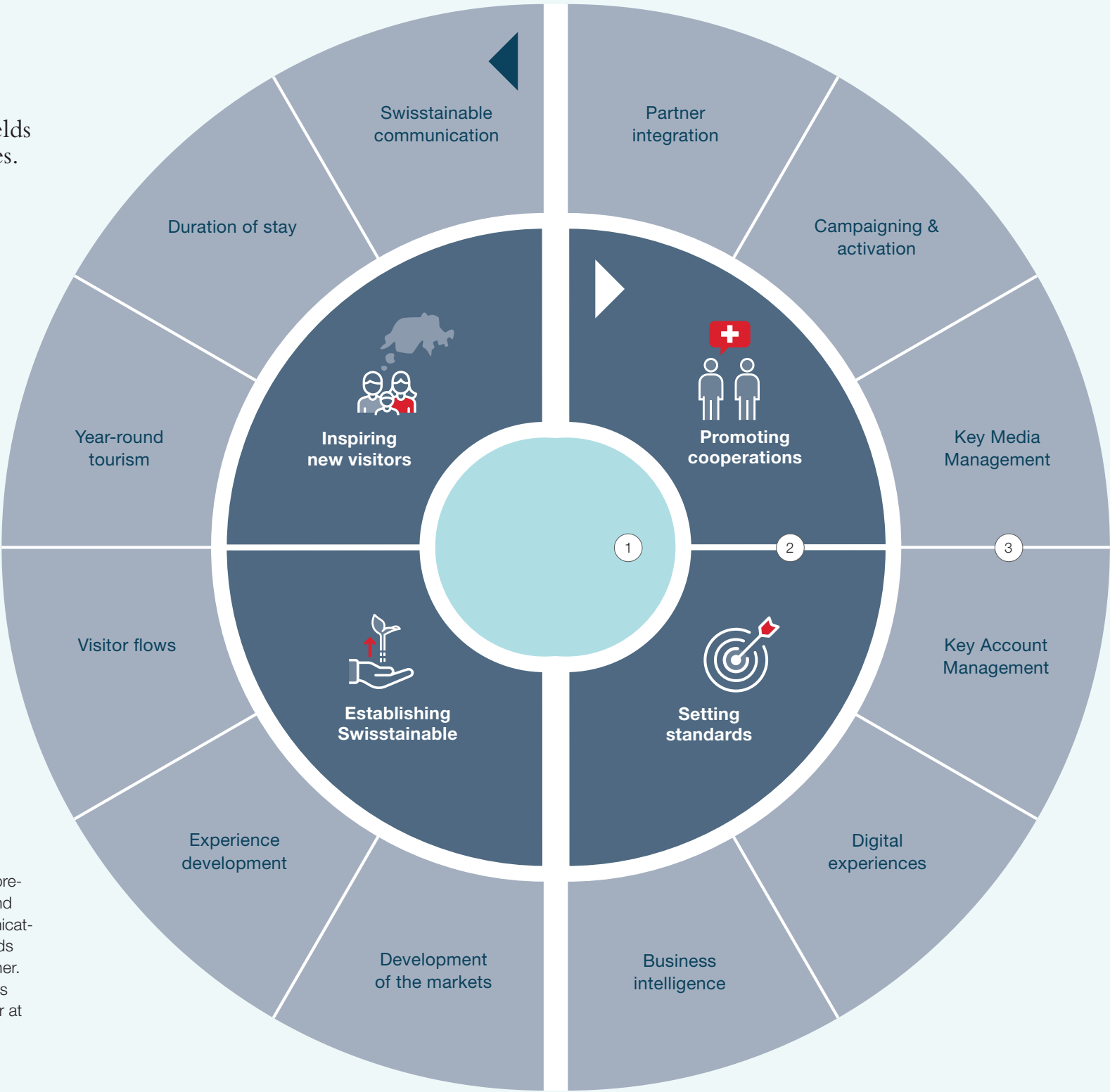
2

The **goals** provide orientation and ensure that the vision is pursued in the long term. → p. 19

3

The **fields of action** define the specific areas in which ST is active. They determine the thematic and practical focus. → p. 20–27

**Application**  
The aim of the strategy wheel is to promote a comprehensive understanding of ST’s strategic direction and to support staff in prioritising activities and communicating decisions. In total, there are 4 goals and 12 fields of action that can be flexibly linked with one another. In order for concepts, budgets or project proposals to be approved, it is imperative that they each cover at least one goal and one field of action.



## Goals



### Inspiring new visitors

ST takes on the complex and expensive task of reaching out to new visitors.

**Measured by:** share of first-time visitors, top marketing contacts, top media contacts



### Establishing Swisstainable

ST is unfailingly committed to more sustainable tourism in an effort to encourage guests to travel more consciously, with greater enjoyment and for longer.

**Measured by:** duration of stay, seasonal and geographical distribution, added value, programme participants



### Promoting cooperations

ST uses attractive marketing and market platforms to showcase its partners.

**Measured by:** satisfaction surveys, partner investments



### Setting standards

ST sets its own bar very high and is constantly testing the latest techniques in tourism marketing, thereby setting standards in the industry.

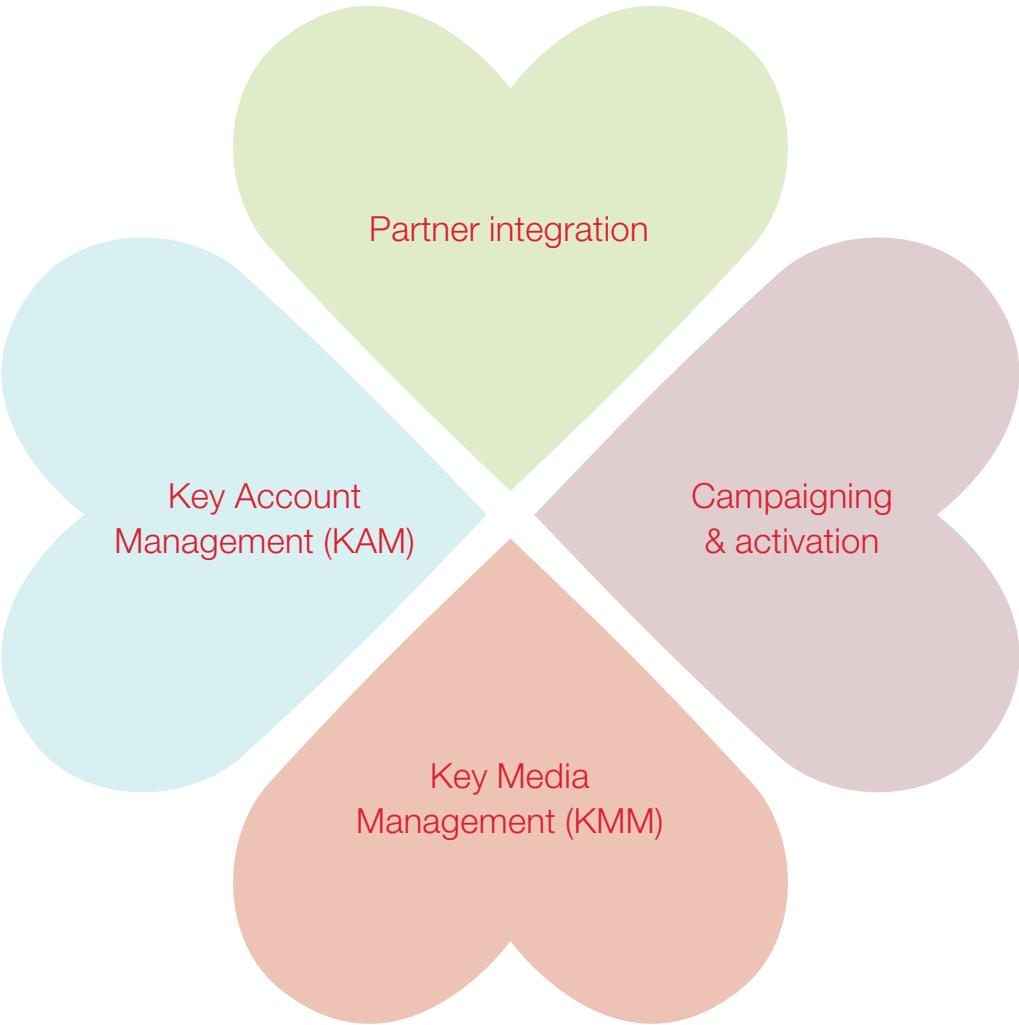
**Measured by:** awards, competitive analysis, launching of innovations





Fields of action for integrated marketing

ST focuses on an integrated marketing mix with four central fields of action: partner integration, campaigning & activation, Key Media Management and Key Account Management.



Partner integration

ST integrates around 1,200 tourism partners, comprising regions, destinations, railway companies, hotels, conference and seminar providers, supplementary accommodation providers as well as leisure activity providers, in its campaigns and marketing activities. Corporate partners are also involved in the campaigns and marketing activities. The pooled use of resources by ST and its partners generates greater media attention, extends reach and increases traffic on the digital ST platforms. ST works with various service providers, including regions and transport companies, to market Switzerland as a business tourism destination. —> p. 36–37



Key Media Management (KMM)

Key Media Management is one of ST’s most efficient and influential communication tools. Media work in the 23 ST markets positions Switzerland worldwide as a “love brand” and a pioneer with respect to sustainable tourism. The focus here is on unpaid (earned) media activities, which enjoy maximum credibility among guests. ST also has many of its own communication channels (owned) and pays for (paid) advertising space in all forms of media. This taps into the market expertise of the ST offices. —> p. 42–43



Campaigning & activation

ST relies on long-reach campaigns that are produced centrally and played out worldwide to strengthen Switzerland as a “love brand”. In addition, market key partner campaigns that are not produced centrally pick up on market-specific focus topics and are played out locally there. Inspiring digital campaigns also ensure that Switzerland retains its reputation as the perfect place for business tourism. In addition to MySwitzerland.com, ST’s social media channels also play an important role in all campaigns, ensuring visibility among the relevant target groups. —> p. 38–41



Key Account Management (KAM)

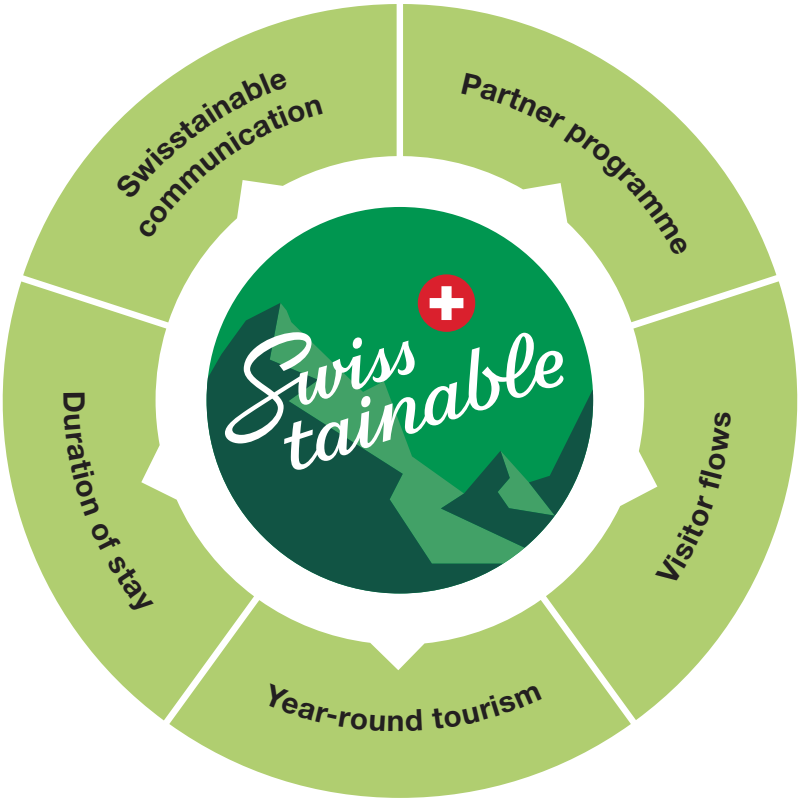
ST works with various travel product intermediaries (key accounts) worldwide, such as tour operators and online travel agencies (OTAs). Focus topics, such as extending the duration of stay or Swisstainable, are thus translated into bookable trips. The aim is to cover all focus topics across all markets. In the field of business tourism, ST specialists continuously evaluate new initiators and organisers with high potential, while maintaining existing client relationships and communicating relevant (tourism) content. ST’s market presence and its role as a central point of contact between clients and partners offers a decisive competitive advantage. —> p. 44–47





Fields of action for sustainable tourism

Within the framework of the Swisstainable sustainability initiative, ST focuses on the following five fields of action for sustainable tourism: steering the visitor flows, promoting year-round tourism, extending the duration of stay and Swisstainable communication. The partner programme provides the foundation for the sustainability initiative and involves the entire industry.



Partner programme

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 (STF), the regional tourism organisations (RDK), as well as other professional tourism

associations and the service providers. All service providers and destinations that are committed to sustainability and participate in the programme are permitted to use the Swisstainable label. Admission to the programme and classification into one of the three levels is handled by the STF's Competence Centre for Sustainability (KONA).

**Target:**  
4,000 companies and organisations to have joined the Swisstainable programme by the end of 2024.



Visitor flows

ST actively promotes a balanced spread of guests throughout Switzerland in order to reduce capacity bottlenecks in popular destinations. The relevant instruments used include:

Touring experiences

The Grand Tour of Switzerland and the Grand Train Tour of Switzerland are ways of encouraging the distribution of guests across different regions.

“The magic of beautiful places”

Lesser-known but equally charming sites are promoted in collaboration with the Federal Inventory of Swiss Heritage Sites (ISOS).

Year-round tourism

ST advocates for seasonal diversification in tourism to achieve a more even occupancy throughout the year. Various instruments are used to achieve this goal:

A broad market portfolio

Different peak travel times are considered and promoted for different source markets.

Shoulder season marketing

ST actively promotes autumn as a season in its own right, which is gaining in popularity.

Business tourism

The areas of business events, health tourism and destination weddings are the subject of specific promotions, since these forms of tourism take place almost exclusively outside of high season.

Duration of stay

“Less often, for longer” replaces the previous pattern of “more often and shorter”. ST is actively working to highlight and promote the benefits of longer stays in Switzerland. Various instruments are used for this purpose, including:

Arrangements with tour operators

Arrangements are specifically made with tour operators aimed at longer stays (e.g. more than three nights).

Marketing of multi-day offers

The central focus here is on the Swiss Travel Pass, the Grand Tour of Switzerland or the Grand Train Tour of Switzerland.

“Bleisure”

By combining business and leisure, also known as “bleisure”, business events can be exploited as a catalyst for additional hotel overnight stays.

Swisstainable communication

Using broad-based communication campaigns, Swisstainable will be effectively promoted as a central theme in all contexts: summer, autumn, winter, cities and business events. Swisstainable is presented using a positive and inspiring communication style that conveys sustainability in a refreshing way. ST focuses on the topics of mobility, water, localism and hospitality. Guests receive the following recommendations:

- Enjoy nature up close and at first hand
- Experience the local culture in an authentic way
- Consume regional products
- Stay longer and delve deeper



Fields of action for digital leadership

Two fields of action – “digital experiences” and “business intelligence” – are ST’s focus areas within digital leadership. While the aim of digital experiences is to design the most effective way to reach guests in the digital space, business intelligence focuses on collecting and analysing data in order to gain valuable insights.

Digital experiences

A digital experience begins by addressing the relevant target groups with the core messages, whether as part of a campaign or by promoting products and partner offers. ST mostly uses tried-and-tested social media platforms, but at the same time is continuously testing innovative channels to reach even more potential new visitors. Video formats are proving to be very effective, which is why the expertise is being expanded further in this area. The aim here is that (future) guests should interact as intensively as possible with ST’s content. Well over 100 million video views and over 5 million interactions on social media alone speak for the success of our digital experiences.

Business intelligence

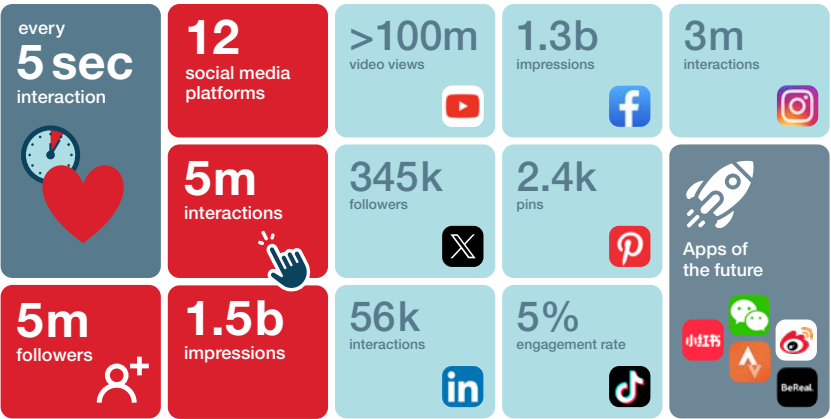
More information on this can be found on pages 12–13.

Tech Radar

In the context of rapidly changing digital technologies, it is important to maintain an overview and to set a course in good time. ST regularly updates its Tech Radar, a visual tool for assessing current digital trends and technologies in tourism marketing.



Keeping updated



The most important social media key figures at a glance. On average, guests interact with ST through one of its 12 social media channels every five seconds.

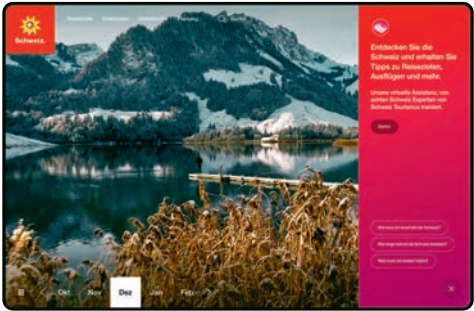
**MySwitzerland.com** ① is at the centre of all digital communications. With customised content for over 30 markets in 14 languages, potential new visitors are guided as they choose their trip to Switzerland. Using a brand-new, AI-based “conversational chatbot”, ST also provides individual advice, whether in response to specific questions or as insider tips. The newsletter regularly keeps guests up to date with unique and individual stories. CRM (Customer Relationship Management) controls the channels and enables personalised experiences across all channels.

Planning, navigation and discovery – these are the core functions of the **Grand Tour app** ②, which enables guests to get the most out of their touring experience. Using technology such as non-fungible tokens (NFT) and augmented reality (AR), the app also allows users to collect digital items at a number of different photo spots. This development is proving to be a successful first step in Web 3.0.

**Mixed-reality headsets** ③ will soon be ready for the market, but will continue to be developed further. ST is exploring the opportunities for such novel applications in tourism marketing. The focus is on bringing realistic Swiss experiences to living rooms all over the world.

**Artificial intelligence (AI)** has the potential to bring profound change to the tourism industry. ST is tapping into this potential through four focal points:

- 1. Use cases: ST is identifying and testing promising AI applications and implementing them to benefit itself, its partners and its guests.
- 2. Monitoring: ST is monitoring the dynamic advances in AI and sharing its insights with the industry.
- 3. Enabling: ST is strengthening staff expertise in dealing with AI through guidance, best practices and training.
- 4. Governance: ST is establishing clear rules for the responsible use of AI.



① **MySwitzerland.com** now offers a new integrated AI-based **conversational chatbot** (pictured: prototype of the chatbot)



② Planning, navigation and discovery with the **Grand Tour app**



③ ST is testing the application of **mixed-reality headsets**. (AI-generated image)





Fields of action for global marketing

The global marketing of Switzerland as a tourist destination is strengthened by cross-regional and cross-destination experiences as well as a presence in selected markets.

Experience development

ST is generating unique experiences in the areas of touring, product development and live communication.

Touring

The Grand Tour of Switzerland and Grand Train Tour of Switzerland will inspire guests to discover more of Switzerland. With a focus on sustainability, longer stays and immersion in nature and culture away from hotspots are also encouraged. In the area of tourist mobility, new products are being created and their development is promoted.



Touring Magazine 2023

Product development

Based on the identification of travel needs and trends, and working in close collaboration with industry partners, tourist experiences are created and hosted that are incorporated into ST's campaigns. A special landmark initiative will be launched in 2024 with "Grape Escapes". This product offers exceptional sensorial accommodation experiences with varied gastronomic offerings in selected winegrowing regions.



Grape Escapes: ST, in collaboration with Swiss Wine Promotion, is looking for accommodation providers in Switzerland's winegrowing regions.

Live communication

ST connects and inspires people by creating first-class event experiences and promotes networking among its partners both in Switzerland and abroad. With a live communication portfolio of more than 30 different event platforms and by implementing more than 80 events per year in Switzerland and abroad, ST marketing campaigns receive optimum support and help maintain networks within the industry.



Switzerland Vacation Day 2023 in Interlaken

Development of the markets

ST has a local presence in selected markets and is continuously developing this market portfolio.

Optimum market distribution

ST sees the optimum market distribution as 45% domestic visitors, 35% European visitors and 20% visitors from long-haul markets. The targeted market distribution is intended to spread the risk and to make Switzerland more resilient as a tourist destination. By broadly diversifying markets, Switzerland will be able to more effectively compensate for unexpected declines in demand and thus gain stability.

45%  
Domestic market

Securing Switzerland

The domestic market is and will remain the backbone of Swiss tourism. ST seeks to inspire Swiss guests to keep discovering new things in Switzerland. The focus is on Switzerland's diversity, emotional storytelling and insider tips away from the tourist hotspots.

Focus: **steering and promotion**

Developing long-haul markets

Quantitative growth does not seem to be the main challenge for the long-haul markets at present. In the Americas, the Middle East and Asia-Pacific, the focus is therefore on quality: the aim is to encourage guests to stay longer and use public transport as well as to increase the share of individual travellers and small groups.

Focus: **steering ahead of promotion**

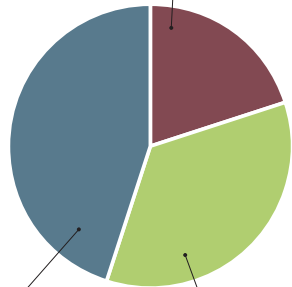
Winning back Europe

International tourism to Switzerland has its roots in Europe. Every third hotel overnight stay originates in the short-haul markets. These are mature markets, and a large proportion of potential guests have visited Switzerland before. Added to this are challenges such as price sensitivity, the strong Swiss franc and growing international competition. "Win Back Europe" is therefore an ongoing challenge. In Europe, quality growth is being sought, among other things with new, younger target groups.

Focus: **promotion ahead of steering**

20%  
Long-haul markets

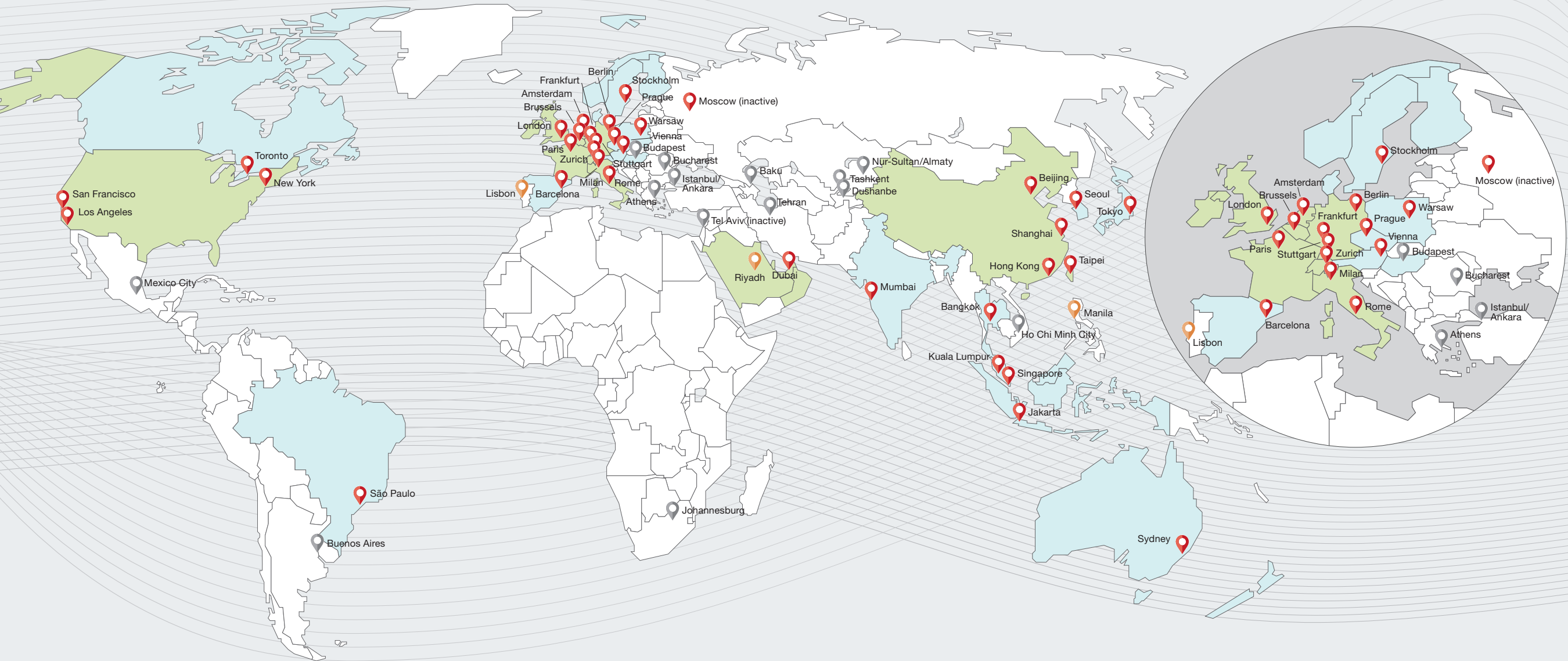
35%  
Short-haul markets



# Market organisation

A physical presence in the markets is essential for Swiss tourism.  
The current ST market network consists of 37 locations in 23 markets and serves a total of 196 metropolitan regions.

Market category	Definition	Organisation
<div></div> Priority markets	Five-year average of at least 1 million overnight stays or CHF 150 million in revenue	Permanent presence <div></div> One to three ST offices, and at least four full-time employees
<div></div> Active markets	Solid Swiss business with a median of 375,000 overnight stays per year	Permanent presence <div></div> At least one ST office and two full-time employees
<div></div> Antenna markets	At least 40,000 overnight stays annually, with economically favourable conditions that suggest further growth	Temporary presence of at least two years One part-time employee on site
<div></div> Future markets	Markets with the economic conditions needed to develop market potential in the medium term	Selective processing through individual activities, without any physical presence in the market





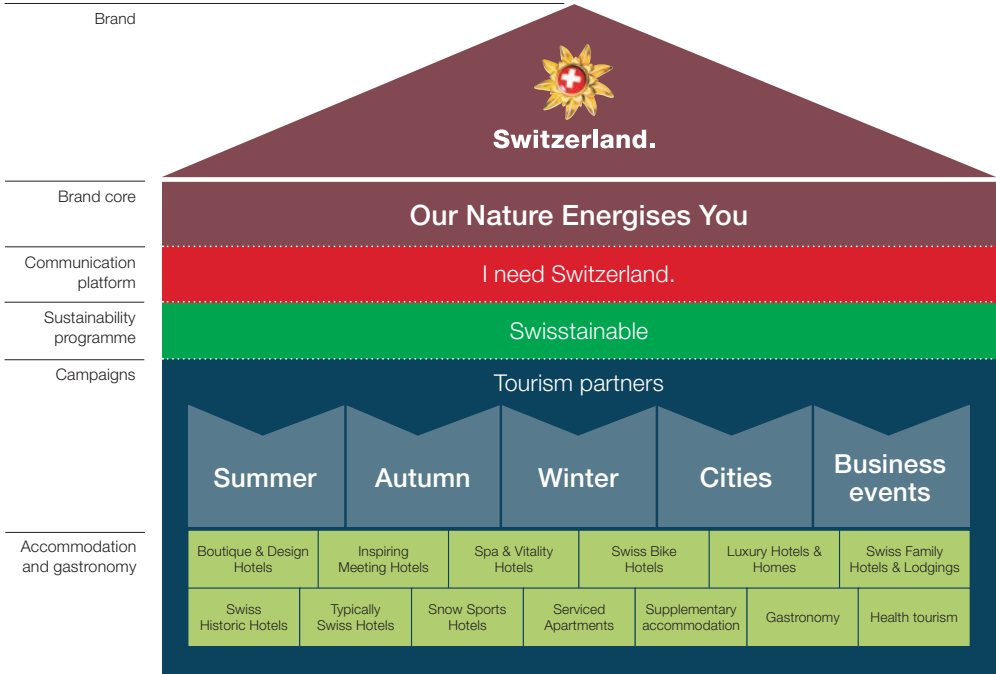
# Activities 2024

## Foundation for activities

The information landscape is characterised by a continuous stream of new online platforms and AI-generated content. Here, as a trustworthy Swiss destination brand, ST is committed to credible information. With its instruments and activities, ST is establishing itself as a neutral and reliable marketing partner of the tourism industry.

### Brand house

The ST brand house umbrella encompasses a strong brand that embodies Switzerland's image as a "love brand". The brand core ("Our Nature Energises You") focuses on the unique nature experiences that Switzerland has to offer. The communication platform based on the "I need Switzerland." manifesto conveys these messages in a consistent and appealing way, while the Swisstainable programme emphasises the commitment to sustainable tourism. The ST brand house is further strengthened through targeted partner campaigns with accommodation and gastronomy providers.



Turning plastic into swimwear.  
With the Round Rivers founder Peter Hörnig on a summer's day in Zurich.

Saffa Island, Zurich, © Christian Weixner

Brand wheel

The Switzerland brand encompasses various dimensions, which are depicted in the brand wheel. All dimensions are geared towards spreading a consistent brand message and promoting the brand core “Our Nature Energises You”.



Destination brand






ST's mission is to make Switzerland known and desirable to guests worldwide as a travel destination. In doing so, the brand serves as a key and platform for tourism service providers to market unique experiences in Switzerland. To ensure the highest level of attractiveness and relevance at all times, it is essential to continuously develop the Switzerland destination brand and keep it up to date.

In recent years, decisive key features have emerged to strengthen the Swiss tourism brand. The brand must become more digital and exemplify the digital transformation, since modern brand identities must be contemporary, progressive and appealing. Moreover, in an increasingly complex world, trust is crucial. Where a simple logo used to suffice, today immersive, flexible brand worlds are in demand that have a holistic effect.

ST has recognised that a brand must be built not only for today, but also with foresight for the future. The claim goes on: ST not only actively shapes the future, but also offers convincing solutions for current and future challenges. For this reason, the organisation has decided to subject the brand experience of Switzerland as a travel destination to a comprehensive review and to further develop the brand, which has so far been characterised by the goldflower logo. The revised brand world will be introduced over the course of 2024. This allows ST to not only meet today's requirements, but also those of the future in a modern and digital world.

Customer journey

Based on the customer journey, ST is able to better understand and design the various phases of customer interactions. It offers a comprehensive view of the customer journey – from initial contact to long-term retention. Use of the customer journey enables optimised targeting, communication via preferred channels, optimisation of touchpoints, as well as personalisation and strengthening of guest loyalty.

 <p><b>1. Dreaming</b></p> <p>Guests are enchanted by breathtaking images and inspiring stories about Switzerland, while dreaming of unforgettable adventures and beautiful scenery.</p> <p>Channels used: Offsite – various platforms</p>	 <p><b>2. Planning</b></p> <p>Guests start to actually plan out their trip to Switzerland by finding out about the various regions, activities and accommodation on offer.</p> <p>Channel used: MySwitzerland.com</p>	 <p><b>3. Booking</b></p> <p>Guests choose their favourite travel options and book accommodation, activities and transport for an unforgettable time in Switzerland.</p> <p>Channels used: MySwitzerland.com, partner platforms (STC, etc.)</p>	 <p><b>4. Exploring</b></p> <p>Guests immerse themselves in the fascinating culture of Switzerland, explore picturesque locations, enjoy the diversity of Swiss cuisine and experience unforgettable adventures.</p> <p>Channels used: MySwitzerland.com, ST apps</p>	 <p><b>5. Remembering</b></p> <p>Guests return home with wonderful memories and make plans to experience the beauty and hospitality of Switzerland again in the future.</p> <p>Channels used: Offsite – various platforms</p>
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Personas

The previous segments were functional for some time, but now personas are coming to the fore to create a deeper understanding for guests travelling to Switzerland.

Using personas brings with it the following concrete advantages:

- increased focus on guests
- more personalised advertising activities
- clearer prioritisation
- consistent guest comprehension

Leisure personas

The clear description of the personas allows the marketing of Switzerland as a tourist destination to be adapted more precisely to the wishes of leisure travellers. Marketing activities can thus be precisely targeted to generate lasting interest in travel to Switzerland and effectively engage partners.



The persona frameworks are available for download:



Personas for ST members



Personas for hotel cooperations



Personas framework LOU, page 1 from 3



**LOU**  
**Down Pacer**

Lou is looking for a relaxing time away from home and wants to free herself from stress, with a preference for nature, spas and leisurely city strolls.



**QUINN**  
**Pleasure Seeker**

Quinn is looking for aesthetics and indulgence, appreciates exclusive experiences and pamper himself and his loved ones.



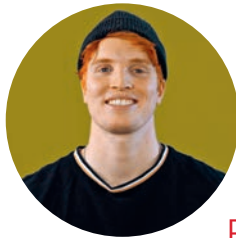
**KRIS**  
**Local Explorer**

Kris wants to escape everyday life and prefers to discover authentic cultures and places off the beaten track.



**MAX**  
**Highlight Traveller**

Max values comfort and thoughtful organisation, planning trips in advance to experience sights and traditions.



**JO**  
**Active Adventurer**

Jo is a sports enthusiast and chooses destinations according to the variety of activities on offer there to escape everyday life and experience adventure.



**PAT**  
**Bonding Educator**

Pat strives for a work-life balance and dedicates his holidays to quality time with the family and enriching experiences for his children.

Business event personas

In addition to the personas for leisure tourism, ST has developed personas for business tourism to further consolidate Switzerland's positioning as a first-class location for business events. The aim is to significantly increase access to the initiators and organisers of business events via digital channels.

The images of the business event personas were generated with AI.



**Alex**  
**Growth Strategist**

Alex focuses on increasing business success and professional development. He uses events to open up new business opportunities.



**Bobby**  
**Networking Ace**

Bobby believes that strong relationships are a key success factor. The lasting experience of the participants is important to him.



**Charlie**  
**Win-Win Creator**

Charlie promotes the development of others and co-operation. Pragmatically, she ensures budget compliance and the satisfaction of sponsors and guests.

# Partner integration

ST continuously strives to offer its partners the most effective platforms. The intensity of the cooperation is determined by the partners according to their possibilities and goals.

The partner model distinguishes between two types of partners:

**Tourism partners**

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

**Corporate partners**

ST integrates corporate partners into international marketing, securing substantial funding as a result while increasing the reach 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.



**1. Basic mandate**

ST has the legal mandate to promote the tourism destination of Switzerland as a travel destination, both nationally and internationally, and to be on hand to offer advice to the tourism industry. This work benefits all tourism stakeholders across Switzerland. They all benefit equally from MySwitzerland.com, from higher-level advertising campaigns and the know-how from the market network.

**2. Membership**

Membership with ST offers networking opportunities as well as other valuable benefits. Members receive discounted access to industry events and exclusive market research data. In addition, membership enables participation in ST's global marketing activities. Additional memberships in organisations such as the Switzerland Tourism Council enable greater access to specialised expert bodies.

**3. Individual activities**

ST offers the tourism industry the opportunity to participate in a wide range of global marketing activities on a selective basis and as required. These include, among other things, participation in sales platforms, advertising opportunities in digital and print media as well as the co-creation of cross-regional product development initiatives.

**4. Partnerships**

The approximately 1,200 tourism partners have the opportunity to actively participate in ST's marketing activities within the framework of three types of campaigns (regions & destinations, accommodation & gastronomy, markets) and thus increase their presence and reach. In addition to tourism partners, corporate partners also benefit from close cooperation with ST. Through official, strategic and premium partnerships, they are integrated into ST's marketing activities, thus benefiting both sides: ST secures substantial financial resources, while partners get a wider reach for their activities thanks to customised offers. In the area of business tourism, around 30 tourism partners are specifically integrated into the marketing activities through the SCIB partnerships.

**Partner investments**

	Actual 2022	Forecast 2023	Budget 2024
Members' contributions*	1.55m	1.58m	1.56m
Revenue for tourism partners	25.4m	27.1m	27.0m
Revenue for corporate partners	8.0m	8.2m	8.3m

\* Excluding membership fees of the Switzerland Tourism Council



# Campaigning & activation

ST’s campaigns 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.

## Swisstainable on the move

The campaign establishes Switzerland as a sustainable travel destination. The campaign focuses on all phases of the customer journey (p. 32/33), but places special emphasis on the dreaming and planning phases. Central messages and themes are based on the needs of the personas of Lou and Pat (p. 35). Close cooperation with a wide range of industry partners is being sought, and especially with public transport service providers, with the aim of advancing the overall objective of Swisstainable.



The Swisstainable campaign is additionally supported by various market activities. Here is a small excerpt for 2024:

### Benelux Hidden treasures

A Swisstainable campaign based on the campaign “The magic of beautiful places”, enriched with sustainable experiences of key partners.

### China Multi-year Swisstainable platform

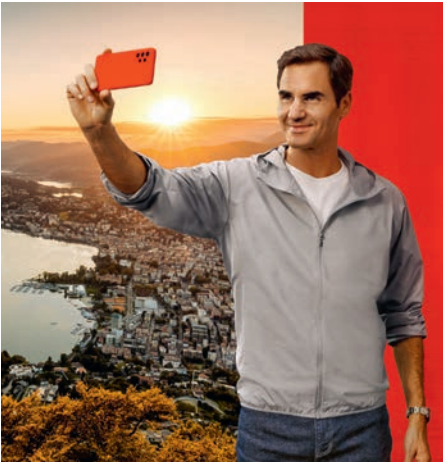
Guidance and product development around sustainable travel in Switzerland in partnership with local platforms, starting with Mafengwo (a local online travel agency).

### Italy Eurocity Push to Switzerland

Promoting train travel to Switzerland with special Eurocity offers in collaboration with Trenitalia.

## Roger Federer goes Autumn

The campaign accompanies the target groups along the customer journey and addresses the dreaming and planning phases. Various channels in the areas of paid, earned, shared and owned are used to align the messages and topics with the needs of the personas of Lou and Kris. The campaign aims to raise awareness of the Swiss autumn among European guests and establish it as a strong travel season in its own right.



## Always on: Dynamic Content

ST is creating a Dynamic Content campaign aimed at sharing travel-related inspiration on a daily basis. The campaign uses artificial intelligence and data-based, fully automated play-out. So the guests are addressed based on their interests. Content from MySwitzerland.com is distributed on Facebook, Instagram or via Messenger. Thanks to automation, ST achieves cost-effective “conversions” throughout the year and wins interested contacts for the partners.



## Bleisure travel: Come to work, stay to play

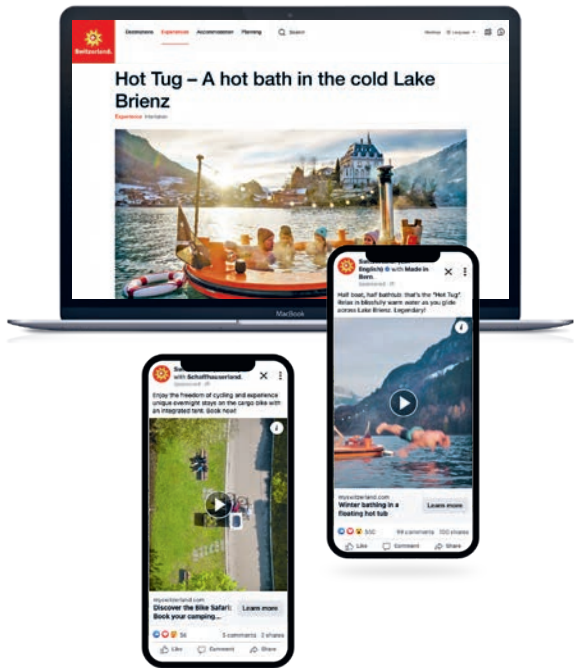
A targeted campaign on the topic of bleisure travel is being used to convince business travellers to extend their stay in Switzerland for leisure purposes. The campaign is aimed both at individual business travellers and at participants on organised business trips and covers the entire customer journey. ST integrates regions, destinations and hotels into the campaign.





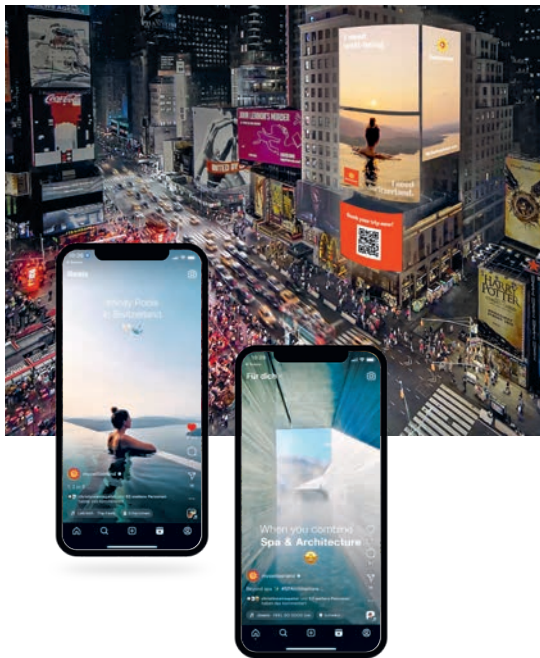
Partnership campaigns:  
regions & destinations

Regions and destinations can participate in campaigns with a focus on the four main themes of cities, summer, autumn and winter. These campaigns have a digital focus, and are produced centrally and distributed globally. Close cooperation with the markets is ensured. The choice of content, channels and markets is made by the partners.



Partnership campaigns:  
accommodation & gastronomy

ST offers hotels and restaurants the chance to participate in campaigns and thereby strengthen their positioning. Central production of content with global distribution, mainly digital, ensures that reach is maximised.



Market key partner campaigns

ST's offices abroad offer Swiss tourism regions and destinations individual partner contracts tailored to the specific needs of customers in the respective market. Here are three planned example campaigns for the year 2024:

North America

Swiss Winter Magic at Bryant Park

Iconic presence and an unforgettable experience at the Bryant Park Holiday Market to attract affluent New Yorkers and domestic/international tourists alike. The multi-channel campaign will be expanded digitally to extend reach and awareness beyond NYC. It will also be involved in selected media and trade activities. In terms of an upgrade, the Mountain Travel Symposium can be booked in addition to cultivate trade relations and establish a presence in North America.

Germany

Switzerland roadshow “Rhine & Rösti” travelling to Switzerland by water

ST Germany, together with its Swiss key partners, is issuing an invitation to an entirely unforgettable Switzerland roadshow in 2024. During the multi-day cruise on the Rhine, Germany's tour operators, media professionals and other VIPs will be provided with information about Switzerland and our current campaigns and thus be inspired to visit Switzerland.

Great Britain

Always-on marketing with “The Telegraph”

Long-term partnership with media platform The Telegraph, the most relevant news platform in the UK with the greatest travel coverage and reader engagement. Continuation of the VIP ambassador campaign that was successfully launched for various regions and travel destinations. The regions determine the topic, the timing and the target group themselves – thereby addressing different groups of guests.

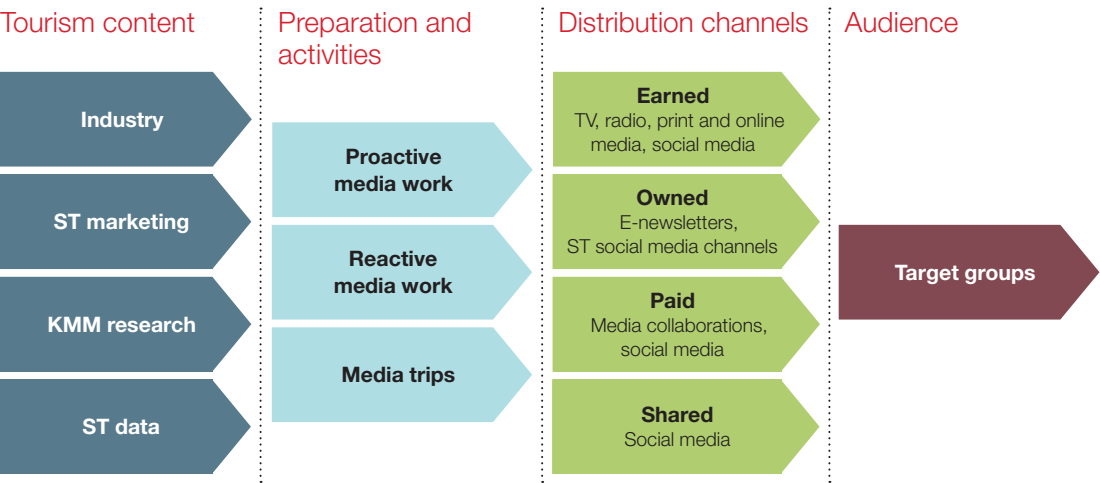




# Key Media Management (KMM)

In a world where media landscapes are constantly changing and the digital revolution is redefining media consumption, ST is at the forefront of presenting Switzerland's image as a first-class travel destination to the media.

At ST, KMM consists of Corporate Communications at the head office and 43 employees responsible for media relations in the 23 markets. Media communication takes place along the content journey of ST's KMM:



- For 2024, **Key Media Management** is pursuing the following media priorities **at its headquarters**:
- Annual and half-yearly media conference
  - Media work to launch projects and campaigns such as Grape Escapes from May or the autumn campaign with Roger Federer
  - Ensuring constant media presence
  - Selective, targeted communication of the first TMS 2024 results
  - Answering enquiries and providing information for the Swiss media
  - Product media relations for Swiss media, proactive and situational, but also reactive

**Key Media Management in the markets** focuses on the presentation of Switzerland as a travel destination and of the partner regions and destinations. This will involve media trips, maintaining contact with travel journalists, media events and media launches. Some planned activities for 2024 from the various markets:

**France**

ST will be represented in the House of Switzerland as part of the Paris 2024 Summer Olympics. It will be situated in the unique setting of the private gardens of the Swiss Embassy. ST will inspire potential guests with an interactive stand in storytelling mode.

**Poland**

Autumn cycling with former world champion Maja Wloszczowska and women's magazine "Wysokie Obcasy Extra".

**North America**

TikTok challenge: content creators will visit Switzerland and compete against one another in a kind of touring race – along the same lines as the popular TV show "The Amazing Race".

**Australia**

Popular Australian chefs will visit various regions in Switzerland and cook local dishes, with partners getting involved in a live TV show with live coverage.

**India**

Continuation of media cooperation (print, digital and social media) with track and field athlete and Olympic champion Neeraj Chopra, with a focus on the outdoor experience (summer and winter) and younger target groups.

**Japan**

In collaboration with the television station BS Fuji, a 25-minute programme about Switzerland is being produced, highlighting the benefits of a longer stay.



Visualisation of House of Switzerland



# Key Account Management (KAM)

In the area of Key Account Management, ST is focusing on the creation of contact platforms and strategic collaborations, which are essential for global cooperation within the tourism sector.

## Leisure tourism

ST is working in close collaboration with tour operators for leisure tourism worldwide. The focus of the collaboration is on sustainable products such as public transport offerings. KAM specialists in the markets intensively maintain and expand the network of key accounts using the KAM toolbox.



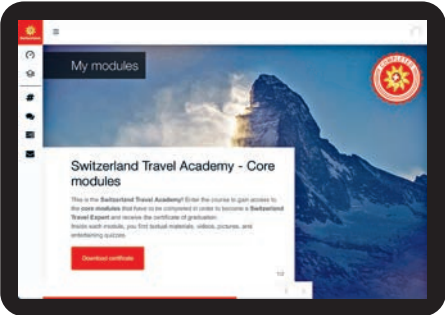
### Sales calls and roadshows

Together with market key partner delegations, the ST market teams tour the world's most important metropolitan regions. They work together to promote Switzerland as a destination in sales calls and in-house training sessions with individual tour operators, in specialist workshops for product managers and buyers as well as at networking receptions for key industry decision-makers, thus increasing its presence in the product portfolios.

### Training sessions & Travel Academy

Agents' expertise with respect to the destination is a key factor in determining whether or not guests choose Switzerland as the destination for their holiday or meeting. ST therefore trains thousands of agents worldwide every year, both in person and virtually. Working alone or with partners from Switzerland,

the ST-KAM teams visit event organisers and resellers in their offices or train them in digital sales calls or topic-based webinars. Through the e-learning platform Switzerland Travel Academy, available in Chinese, English, French, German, Korean, Portuguese and Spanish, agents worldwide get to know Switzerland as a destination, and are able to deepen their knowledge in various additional modules and finally get certified as Switzerland experts.

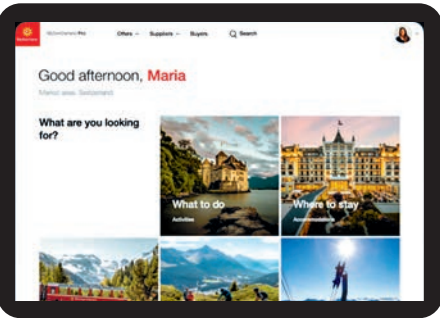


### Trade fairs

Even in the digital world, trade fairs remain an important way to meet the key players in business and leisure tourism and hold successful sales talks. ST coordinates the Swiss presence at the most important global events, such as the International Tourism Exchange Berlin (ITB), the World Travel Market (WTM) in London, and the International Luxury Travel Market (ILTM) events in Singapore, Cannes, São Paulo and the Bahamas.

## MySwitzerland Pro

To enable product managers and buyers to connect with Swiss suppliers at any time and identify the right business partners in Swiss tourism, ST has created the digital marketplace "MySwitzerland Pro", the online counterpart to Switzerland Travel Mart – accessible 365 days a year and around the clock.



More on this can be found at [MySwitzerland.com/pro](https://www.myswitzerland.com/pro)

## Educational trips and industry events

Those who have experienced Switzerland personally will be better able to sell it in their market. For this reason, ST invites tour operators from around the globe every year to get to know Switzerland on educational trips and at industry events, and to connect and cooperate with service providers. As of 2024 all such events are under the common label Switzerland Travel Mart (STM). In addition to the big STM that will next take place in 2025, ST will be launching seasonal events in 2024, such as the STM Winter Edition, with a focus on the winter experience.

Buyers from individual markets or market groups will be invited to the STM Spring Edition and the STM Autumn Edition. In addition, there will be segment-specific events such as the STM Health Edition.



STM Winter Edition 2023, Zermatt

## 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 Switzerland. This ensures that campaign themes find their way prominently into global product portfolios, thus helping to stimulate further 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.



Business tourism

ST's **Switzerland Convention & Incentive Bureau** (SCIB) is dedicated to the acquisition of business events (organised business tourism). Together with regions, destinations and their service providers, the SCIB team increases the visibility of Switzerland as a leading destination for sustainable business events in short-haul and long-haul markets. The KAM toolbox in the area of business events includes trade fairs, sales calls, networking events, Swisstainable business events and trophies.

Swisstainable business events

Studies have revealed: sustainability is continuing to gain in importance when choosing a venue for business events. With the Meeting Planner tool and its finder/filter function, initiators and organisers of business events can search for particularly sustainable hotels and locations (Swisstainable Levels 1–3), framework programmes and activities at MySwitzerland.com and put their business event together according to their criteria. Checklists and tips for organisation and examples of best practice for the organisation of particularly sustainable events inspire further. Sustainable business events are communicated and showcased.



Swisstainable cooking workshop with Dutch journalists at the “Peter Pan kookstudio” in Amsterdam



Asia Trophy 2023

Trophies

In the form of rallies, around 150 account managers from agencies in Europe, North America and Asia discover the infrastructure for meetings, are inspired with unusual framework programmes and experience for themselves just how successfully a business event can be held in Switzerland. And they will hopefully suggest Switzerland to their corporate clients for their next event as a result. The tourism partners are integrated into the teams or meet the clients at a workshop and can thus conduct sales talks and build valuable business relationships.



Sustainable meetings in Switzerland

Health tourism

In 2024, several health missions will take place in the Gulf States, China, Brazil and Central Asia, with Swiss clinics working in close collaboration with local companies in the industry. In addition, various networking events and educational trips are planned. The annual STM Health brings together leading international medical companies and Swiss clinics and hospitals, thus creating networking platforms and synergies in the international medical sector.



STM Health Edition 2023, Engelberg

Destination weddings

Destination weddings keep on 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 relating to destination weddings is communicated through social media, key B2B platforms and media relations activities.

Example of an activity in 2024:

About 40 wedding planners from around the world (North America, China, India, the UK, France, the Gulf States and Southeast Asia) are invited to discover the most romantic hotels and venues for international destination weddings in the cities, in the countryside and in the mountains.

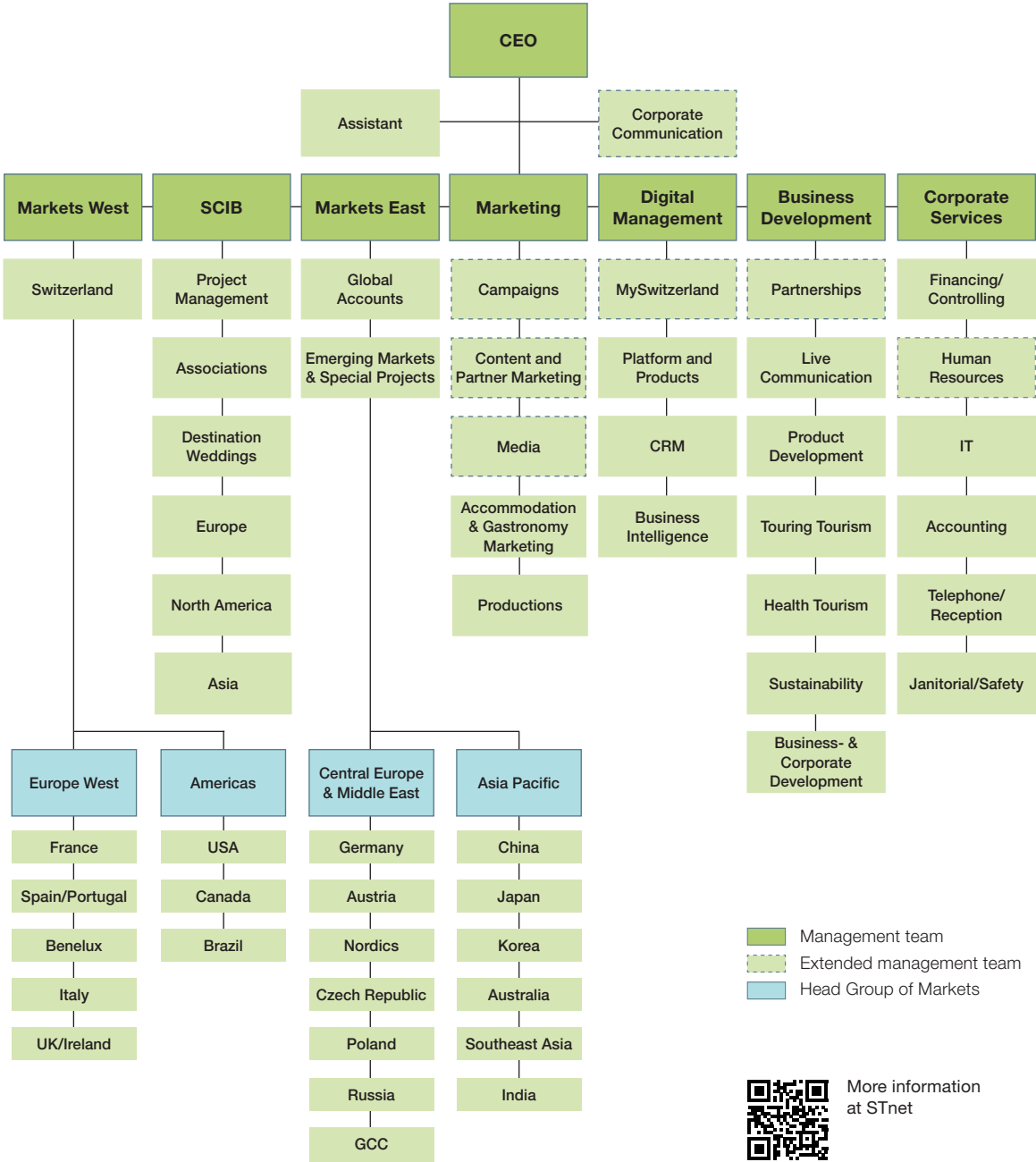




# Management

## Organisation & leadership

ST, headquartered in Zurich, has a global presence and a clear organisational structure. Employee management is based on flat hierarchies, short decision-making paths and strong cohesion.



Via Silenzi – on the path of silence.  
Snowshoeing from the Lower Engadin to Val Müstair.

Scuol, Graubünden, © Colin Frei



More information  
at STnet



Management principles

Respectful interaction and setting ambitious goals in employee management creates an environment that promotes flat hierarchies. Employee development encourages personal initiative, which shortens decision-making paths. With targeted recruitment and a focus on diversity, ST strengthens internal cohesion and promotes a diverse corporate culture.

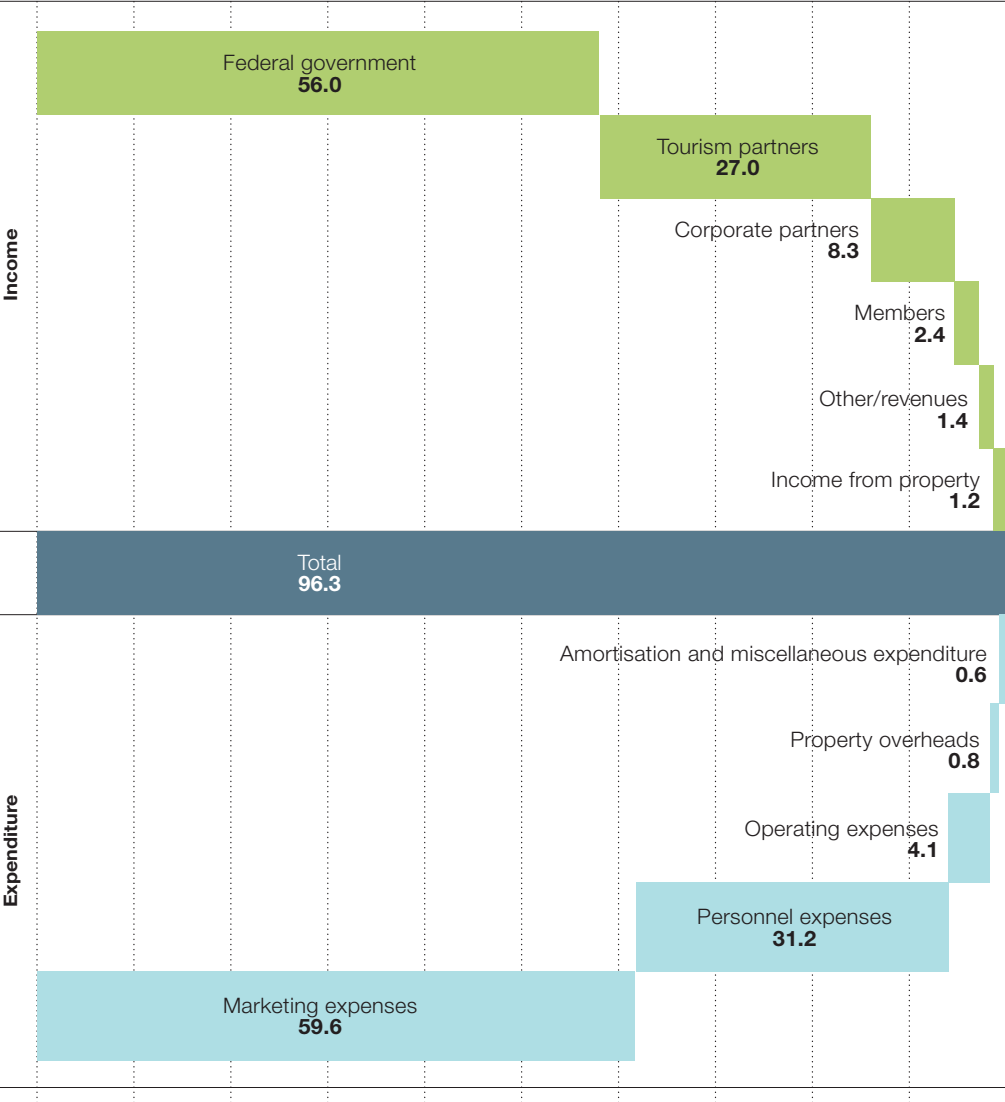


Controlling & reporting

ST monitors the use of financial resources and continuously evaluates the success of activities to maximise effectiveness and efficiency.

Controlling

Annual budget for 2024 in CHF million, divided by income and expenditure



Reporting

ST shows the success and impact of the activities of the entire marketing mix at the output and outcome levels using key performance indicators.

Partner integration

Outputs	Effective 2022	Forecast 2023	Budget 2024
How many partner investments were we able to win?			
Investment from tourism partners	25.4m	27.1m	27.0m
Investment from corporate partners	8.0m	8.2m	8.4m

Outcome	Effective 2022	Forecast 2023	Budget 2024
How satisfied are the partners? (Rating scale 1–10)			
Satisfaction among tourism partners	7.9	8.0	8.0
Satisfaction among corporate partners	–	8.0	8.0

Campaigning & activation

Outputs	Effective 2022	Forecast 2023	Budget 2024
How many people have the activities reached?			
Top marketing contacts*	5.1bn	4.0bn	2.9bn
Web visits to MySwitzerland.com	24.6m	56.4m	53.4m

Outcome	Effective 2022	Forecast 2023	Budget 2024
Have the activities triggered reactions among visitors?			
MySwitzerland.com engagement rate	21%	43%	43%
Social media engagement rate	1.1%	1.2%	1.2%
Customer reactions*	13.8m	13.9m	10.6m

Key Media Management (KMM)

Outputs	Effective 2022	Forecast 2023	Budget 2024
How many people have the activities reached?			
Top media articles	3,858	3,454	3,549
Top coverage media contacts	5.7bn	4.9bn	4.9bn
Qualified interactions with media	12,732	12,452	12,524

Key Account Management (KAM)

Outputs	Effective 2022	Forecast 2023	Budget 2024
How many people have the activities reached?			
Qualified interactions with KAM leisure	17,006	19,105	19,770
Qualified interactions with KAM business events	9,556	8,360	9,305
Requests for proposal business events	923	1,008	1,115

Outcome	Effective 2022	Forecast 2023	Budget 2024
Have the activities triggered reactions among visitors?			
Turnover influenced by tour operators	0.5bn	0.8bn	0.9bn
Turnover influenced by business events	69.9m	72.6m	77.1m

Partner reporting

ST draws up a full report on the activities with its partners. Based on these findings, the activities are improved, and the benefits for the partners are increased.

\*The negative development of the figures in the 2024 budget is due to the decline in financial resources caused by the discontinuation of recovery funding. Due to efficiency improvements, the negative development of the figures in the 2024 budget is less pronounced than the decline in financial resources.



# Partnerships

We would like to thank our partners for their trust and cooperation and look forward to further successes together.

## Strategic premium partners



The trade association of the Swiss hotel industry  
hotelleriesuisse.ch



Financial services  
raiffeisen.ch



Train travel  
sbb.ch



The airline of Switzerland  
swiss.com



Switzerland by train, bus and boat  
mystsn.net

## Strategic partners



American Express in Switzerland  
americanexpress.ch



Retail and wholesale trade  
coop.ch



Car rental  
europcar.ch

### Zurich Airport

Zurich Airport  
zurich-airport.com



GastroSuisse  
gastrouisse.ch



Switzerland Cheese Marketing  
cheesesfromswitzerland.com



#MyVictorinox  
victorinox.com



Zurich Insurance Company Ltd  
zurich.ch

## Official partners



appenzellerbier.ch



bmc-switzerland.com



gubelin.com



swisstravelcenter.ch



harley-davidson.com



hertz.ch



kambly.ch



kirchhofer.com



landquartfashionoutlet.com



mammut.com



rausch.ch



swica.ch



swisseducation.com



swiss-ski-school.ch



swissinfo.ch



swissrent.com



swisswine.ch



visana.ch



whes.ch

## Tourism partners



aargautourismus.ch



basel.com



madeinbern.com



fribourg.ch



geneve.com



graubuenden.ch



j3l.ch



luzern.com



ostschweiz.ch



ticino.ch



ENGRAVED ON MY HEART.

valais.ch



myvaud.ch



zuerich.com

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