

Updated Snapshot: Switzerland (SUI)

Statement

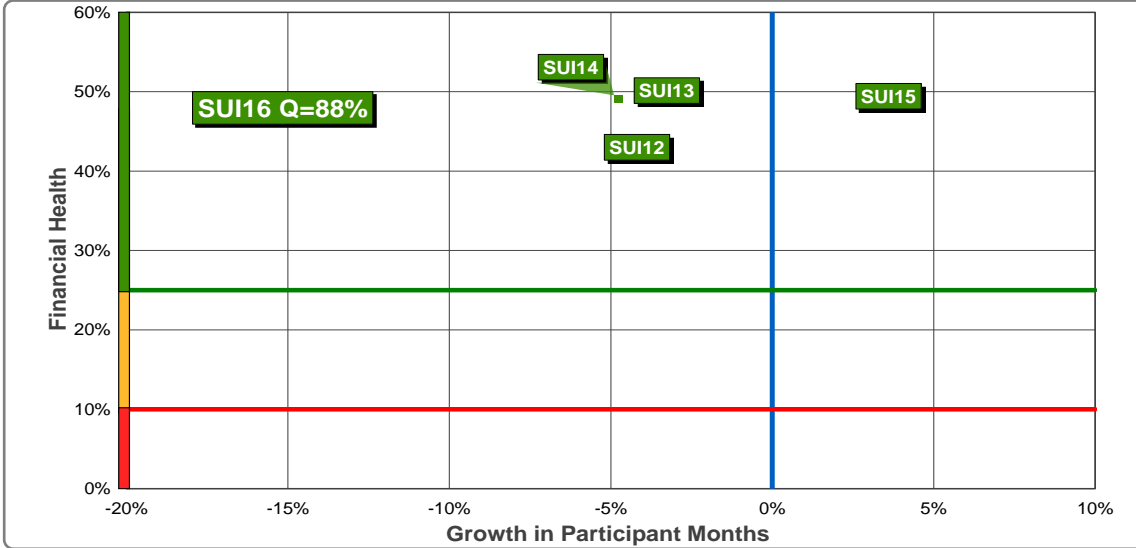
We are faced with a decrease in sending numbers. This is a long-term trend that takes 1-3 years to break; we would expect sending numbers to increase again by NH17 or SH18. With a net negative contribution of 1,500 USD per hosted pax, we were forced to decrease hosting opportunities as well; as soon as we have a better grasp on our host family search process we will increase hosting again. We expect the first improvements by NH17 or SH18 as well.

Partner Organizations 2016

ARG	AUS	AUT	BFL	BFR	BIH	BOL	BRA	CAN	CHI
CHN	COL	CRC	CRO	CZE	DEN	DOM	ECU	EGY	ESP
FIN	FRA	GER	GHA	GUA	HKG	HON	HUN	INA	IND
ISL	ITA	JPN	KEN	KOR	LAT	MAS	MEX	NED	NOR
NZL	PAN	PAR	PER	PHI	POL	POR	RSA	RUS	SLO
SRB	SUI	SVK	SWE	THA	TUN	TUR	USA	VEN	

■ Sending to: 36 ■ Hosting from: 46

3D Health Indicators 2012-2016



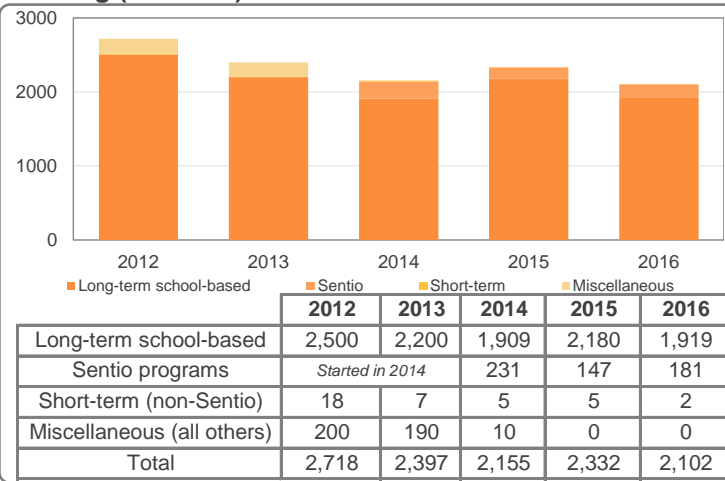
KPIs

Yr	Growth	Finances	Quality
16	-18%	48%	88%
15	+2%	49%	90%
14	-5%	49%	87%
13	-5%	50%	88%
12	-5%	43%	86%

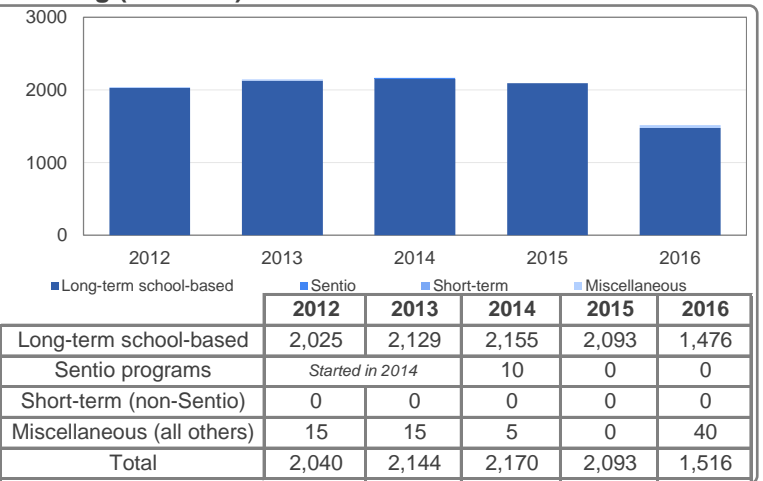
NPPR Status

Yr	Phase
16	No phase
15	No phase
14	No phase
13	No phase
12	No phase

Sending (Pax Mos) 2012-2016



Hosting (Pax Mos) 2012-2016



Quality Assessment 2014-2016

Quality	Hosting CSE				Sending CSE				PSE	Overall Eval Score	Bonus/Penalty	Final Quality Score
	host fam	school	other stu	other nat fam	stu	nat fams	other host fams	other schools				
2016 Network Total	78%	85%	94%	92%	94%	92%	78%	85%	92%	88%	-1%	87%
2016 (CSE16, PSE16-15)	65%		96%	93%	89%	95%	72%	97%	97%	88%	0	88%
2015 (CSE15, PSE15-14)	79%		89%	98%	94%	96%	80%	95%	100%	91%	-1%	90%
2014 (CSE14, PSE14-13)	64%		96%	95%	91%	95%	81%	79%	100%	88%	-1%	87%

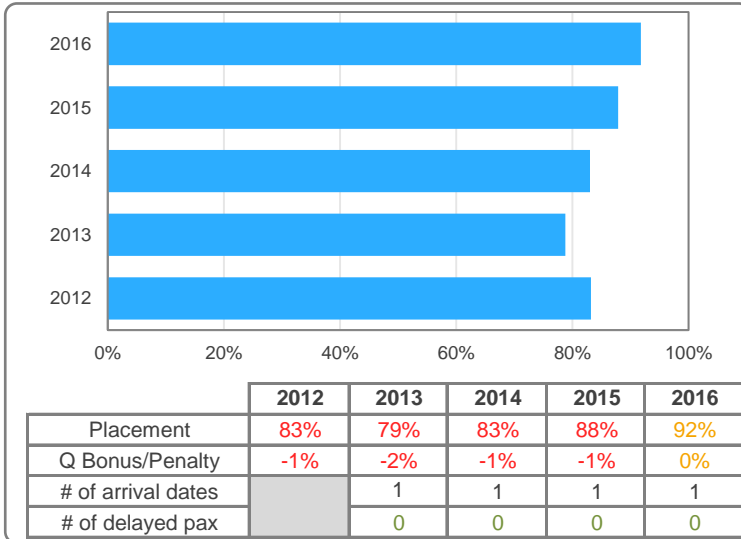
Key Financial Numbers in Effective USD 2013-2015

Finances	Annual Turnover	% of total	Total Expenses	% of total	Net Results	% of unr. net assets	Current Assets	% of expenses	Unr. Net Assets	% of expenses
2015 Network Total	183,453,070	100%	178,003,152	100%	5,449,918	8%	116,051,027	65%	70,545,137	40%
2015	4,893,004	3%	4,856,375	3%	36,629	2%	2,844,237	59%	2,328,946	48%
2014	5,017,593	3%	4,875,997	3%	141,596	6%	2,789,202	57%	2,410,451	49%
2013	4,608,707	3%	4,590,893	3%	17,815	1%	2,646,903	58%	2,251,979	49%

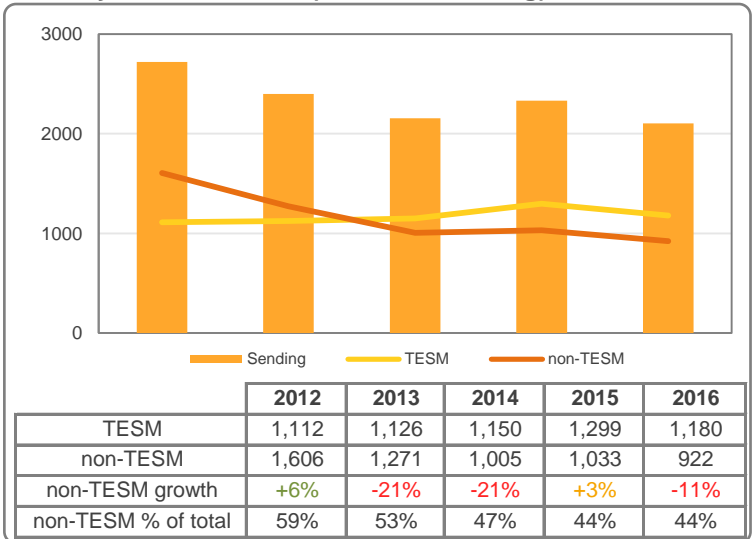
***Unrestricted Net Assets is meaningless because these are negative

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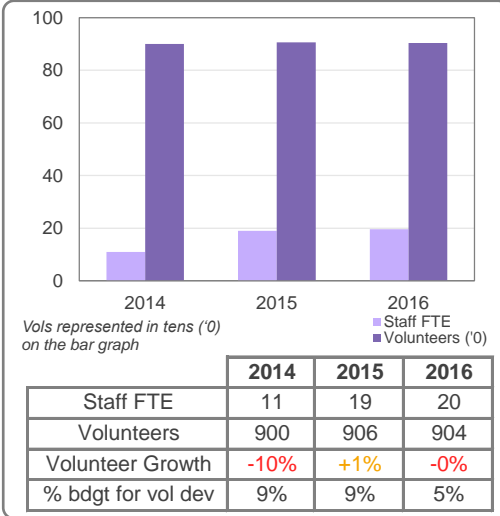
On-time Placement Performance



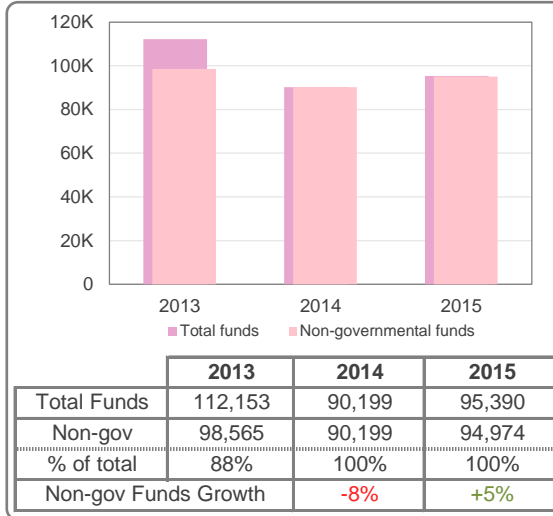
Country Diversification (Pax Mos Sending)



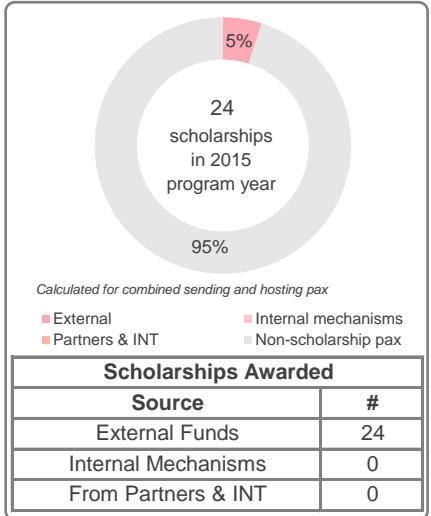
Organizational Structure



External Fundraising for Scholarships



Scholarships Awarded (2015)



Education and ICL

Learning Program Participants (started and completed)			
Level	W	1 - 3	QT
Staff & Vols	3	1	0
% of Total	0.3%	0.1%	0.0%

W = What Every AFSer Should Know About Intercultural Learning, 1 - 3 = LP levels 1, 2, and 3; QT = Qualified Trainers

AFS Market Share and Competitor Landscape

Estimated Market Share (Latest Year Available)		
Outbound	Inbound non-fee paying	Inbound fee & non-fee
13.4%	N/A	26.0%

Non-fee paying = not paying tuition and hosted in volunteer host families; Fee paying = paying tuition and often hosted in paid host families

Orientations								
	PD	A	PA	MS	PR	EOS	PoR	Other
Pax	●		●		●	●	●	●
Host Fams	●							
Nat Fams	●							
Sch/CPOs								

Attendance: 0% (blank) 1-25% ● 26-50% ● 51-75% ● 76-100% ●

PD = pre-departure, A = arrival, PA = post-arrival, MS = mid-stay, PR = pre-return, EOS = end-of-stay, PoR = post-return, Oth = other

Competitors	
Sending (sc programs) YFU, Rotary, into	Hosting (sc programs) Rotary, YFU, schools
Sending (18+ programs) ICYE, SCI, travel agencies, Studex, AIESEC, EF, BOA, others	Hosting (18+ programs) Leonardo (EU program), Internship programs of multinational corporations

Educational System and Accreditation

Educational Designation & Credit Agreement	
<input type="checkbox"/>	Designated as an Educational Entity
<input type="checkbox"/>	(Full) Credit Agreement
<input type="checkbox"/>	(Partial) Credit Agreement

Ties to the World around AFS

International Exposure and Collaboration with Others	
<input type="checkbox"/>	Joint project/new affiliation
<input type="checkbox"/>	External forum or event

Market Environment

Market Trends and Forecasts

The demand for English-speaking destinations and programs continues to grow. In parallel, local schools offer their own exchange programs more and more frequently (usually 3-12 months). Several for-profit organizations offer cheaper programs in TESM and/or more expensive, but customizable ones. AFS is probably not the biggest provider of exchange programs in Switzerland anymore as it has lost a tangible market share. There is no elaborate or exhaustive market information as the for-profit competitors do not disclose their volume data.