

Switzerland

Tourism in the economy

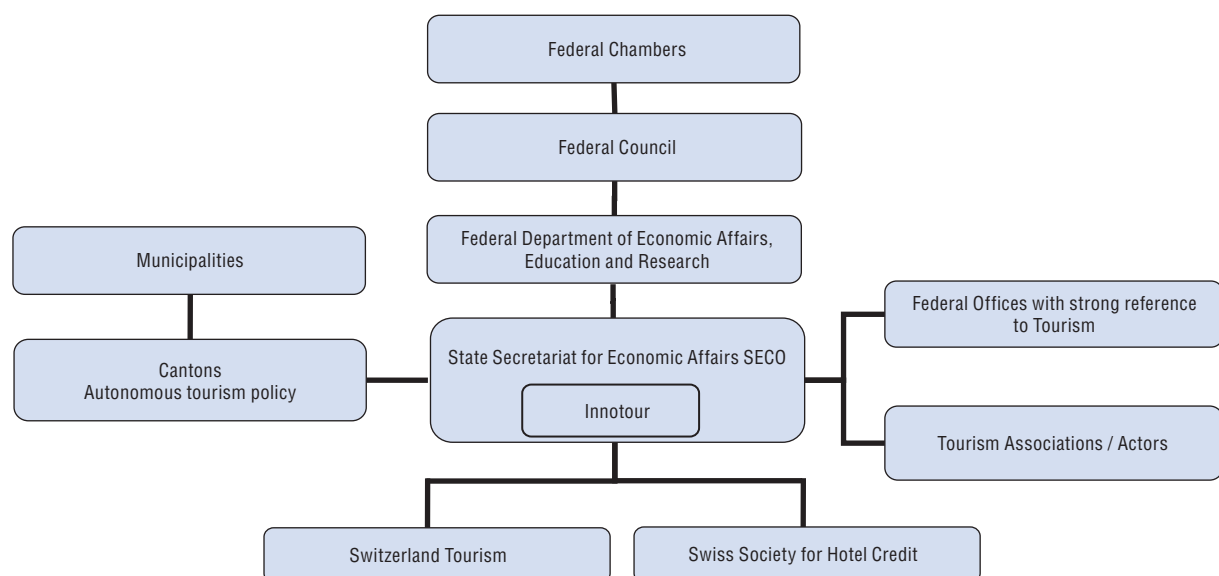
Tourism is an important pillar of the Swiss economy. In 2013, around 168 000 people worked in the tourist industry (full-time equivalents), corresponding to 4.3% of total employment. Tourism contributed 2.6% of the Swiss GDP in 2013.

Almost 36 million overnight hotel stays were registered in Switzerland in 2014. Compared to the previous year, this is a slight increase of almost 1%. Around 55% of overnight hotel stays were taken by guests from abroad. The most important source market remains Germany; however, the number of overnight hotel stays taken by German guests has fallen significantly in recent years. In contrast, the number of overnight hotel stays from China has increased sharply. China has become the fifth most important international source market for Swiss tourism after Germany, the United States, the United Kingdom and France.

Tourism governance and funding

The State Secretariat for Economic Affairs SECO is responsible for executing the Swiss national tourism policy. Numerous political bodies at a national and regional level influence the execution of this policy. The Confederation has two associations, Switzerland Tourism (ST) and the Swiss Society for Hotel Credit (SGH), tasked with implementing

Switzerland: Organisational chart of tourism bodies



Source: OECD, adapted from the State Secretariat for Economic Affairs (SECO), 2016.

important tourism-related measures. ST carries out marketing activities relating to Swiss tourism and SGH supports investments in the accommodation sector and provides consultancy services at market prices.

SECO executes the Federal Act on the Promotion of Innovation, Co-operation and Knowledge Transfer in Tourism (Innotour). A number of different industry associations and actors influence the sector and its contribution to the economy.

In 2014, CHF 58.3 million were available for national tourism policies. Of this, by far the largest part (CHF 52.8 million) is the contribution to Switzerland Tourism. As in previous years, CHF 5 million were available in 2014 for the financing of the promotion of innovation, co-operation and knowledge transfer in tourism.

The Swiss Society for Hotel Credit (SGH) is supported by the Confederation with an existing interest-free loan of around CHF 136 million. In addition, the SGH was granted an additional loan of CHF 100 million, made available in 2011 for a period up to 2015. This period has subsequently been extended to 2019. By the end of 2014 the SGH had used around CHF 27 million of this additional loan.

For the implementation of the Tourism Impulse Programme (see below) the resources for Innotour for 2016-19 have been increased by CHF 10 million to CHF 30 million. In addition, the loan amount for the consolidation of new, replacement or renovation initiatives as well as for non-repayable contributions via the new regional policy (NRP) has been increased by CHF 200 million.

Tourism policies and programmes

The 2013 *Tourism Report* analysed the structural situation of Swiss tourism and the future tourism strategy of the Federal Government. The tourism policy in Switzerland has been guided by this report. The tourism policy is implemented on the basis of four-year programmes.

High prices and costs present a major challenge for Swiss tourism. This was further intensified with the discontinuation of the EUR rate ceiling on Thursday 15 January 2015. Tourism services became significantly more expensive overnight for guests from the Euroregion. At the same time, the tourism offerings in the Euro region became much cheaper for Swiss guests. The result was that Swiss tourism suffered a loss of price-competitiveness.

The difficult situation faced by tourism is known to the policy makers who support tourism with targeted actions to overcome the structural challenges. This is being addressed by the Tourism Impulse Programme 2016-19, which includes the following four approaches:

- Approach I: Modernisation of the accommodation sector. The promotion of the accommodation sector by NRP and Innotour will be intensified. The aim is, amongst other things, to focus on more accommodation projects which use synergies with tourism infrastructures that exist locally. The Federal Government has revised the implementing provisions of the SGH to optimise accommodation development (Box 1.16).
- Approach II: Strengthening of quality and product development. The impulse programme will set greater incentives for product and quality development. Innotour will promote national projects and regional model projects. The resulting experiences and best practices will be made available to the destinations and regions, who will be encouraged to initiate similar projects that can be better supported by the NRP.

- Approach III: Optimisation of structures and strengthening of co-operation. The aim is for continuous improvement of destination structures and marketable accommodation offers. To achieve this, incentives for the development of destinations and co-operation at the operational level are created by Innotour and NRP.
- Approach IV: Strengthening the acquisition and diffusion of knowledge. Improved knowledge will be made available to the cantons and the tourism industry about certain key issues, to help them take appropriate action. For example, questions remain about the exact consequences of the second home initiative on the tourism industry.

Statistical profile

Table 1. **Switzerland: Domestic, inbound and outbound tourism**

	2010	2011	2012	2013	2014
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	69 587	63 035	70 455 |	75 850	..
Overnight visitors (tourists)	7 574	7 695	7 732	7 864	8 004
Same-day visitors (excursionists)	62 012	55 340	62 723 |	67 987	..
Nights in all types of accommodation	..	..	..	..	..
Hotels and similar establishments	15 765	15 752	15 690	15 889	16 026
Specialised establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
Inbound tourism					
Total international arrivals	..	..	..	..	..
Overnight visitors (tourists)	8 628	8 534	8 566	8 967	9 158
Same-day visitors (excursionists)	..	..	..	..	..
Top markets					
Germany	2 238	2 039	1 871	1 854	1 812
United States	680	669	687	726	752
United Kingdom	732	682	659	698	712
France	701	681	669	692	699
Italy	521	483	489	494	504
Nights in all types of accommodation	..	..	..	..	..
Hotels and similar establishments	20 443	19 734	19 076	19 735	19 907
Specialised establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
Outbound tourism					
Total international departures	..	..	..	..	..
Overnight visitors (tourists)	10 011	10 466	12 924 |	13 569	..
Same-day visitors (excursionists)	..	..	..	..	..
Top destinations					
Germany	1 911	1 722	3 053 |	2 952	..
France	1 267	1 625	2 042 |	2 247	..
Italy	2 060	1 905	2 091 |	1 951	..
Austria	763	839	949 |	981	..
TOURISM RECEIPTS AND EXPENDITURE, MILLION CHF					
Inbound tourism					
Total international receipts	18 365	18 236	18 409	18 855	19 205 p
International travel receipts	15 356	15 185	15 100	15 552	15 976 p
International passenger transport receipts	3 009	3 051	3 309	3 303	3 229 p
Outbound tourism					
Total international expenditure	14 023	14 537	16 885	17 697	18 528 p
International travel expenditure	11 644	12 128	14 256	14 970	15 681 p
International passenger transport expenditure	2 379	2 409	2 629	2 727	2 847 p

.. Not available; | Break in series; p Provisional data
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Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888933320585>

Table 2. **Switzerland: Enterprises and employment in tourism**

	Number of establishments	Number of persons employed ¹				
	2014	2010	2011	2012	2013	2014
Total	167 621	168 075	167 984 p	..
Tourism industries	129 066	129 330	129 182 p	..
Accommodation services for visitors	39 419	39 569	39 197 p	..
Hotels and similar establishments	5 129	..	39 419	39 569	39 197 p	..
Food and beverage serving industry	44 488	44 241	43 702 p	..
Passenger transport	23 394	23 982	24 713 p	..
Air passenger transport	7 054	7 062	7 448 p	..
Railways passenger transport	11 740	12 168	12 382 p	..
Road passenger transport	3 443	3 483	3 544 p	..
Water passenger transport	1 158	1 269	1 339 p	..
Passenger transport supporting services	1 077	841	893 p	..
Transport equipment rental	493	506	528 p	..
Travel agencies and other reservation services industry	8 791	8 727	9 102 p	..
Cultural industry	3 236	3 215	3 045 p	..
Sports and recreation industry	5 416	5 448	5 184 p	..
Retail trade of country-specific tourism characteristic goods
Other country-specific tourism industries	2 751	2 799	2 817 p	..
Other industries	38 555	38 746	38 802 p	..

.. Not available; p Provisional data

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1. Data refer to number of employees.

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888933320596>Table 3. **Switzerland: Internal tourism consumption**


Million CHF

	2011		
	Domestic tourism consumption	Inbound tourism consumption	Internal tourism consumption
Total	..	..	..
Consumption products	23 155	14 939	38 094
Tourism characteristic products	12 615	10 485	23 100
Accommodation services for visitors	2 360	3 068	5 429
Food and beverage serving services	2 688	2 510	5 199
Passenger transport services	4 371	3 707	8 078
Air passenger transport services	2 462	2 810	5 272
Railways passenger transport services	1 344	561	1 905
Road passenger transport services	492	299	791
Water passenger transport services	73	37	110
Passenger transport supporting services	304	178	483
Transport equipment rental services	8	218	226
Travel agencies and other reservation services industry	1 932	68	2 000
Cultural services	90	113	203
Sports and recreation services	563	497	1 060
Country-specific tourism characteristic goods	..	..	..
Country-specific tourism characteristic services	298	125	423
Other consumption products	10 540	4 454	14 994
Tourism connected products	2 856	2 042	4 898
Non-tourism related consumption products	7 685	2 412	10 097
Non-consumption products

.. Not available

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Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888933320609>



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