

Switzerland

Tourism in the economy

Tourism is an important pillar of the Swiss economy. In 2016, around 165 675 people (full-time equivalents) worked in the tourism industry, corresponding to 4.1% of total employment. Tourism contributed 2.6% to Swiss GDP in 2016.

There were a total of 10.4 million inbound overnight visitors in 2016. In the same year, international travel receipts were CHF 16.0 billion (up 1.4%), representing 3.7% of total exports.

In 2016, a total of 35.5 million nights were registered in hotels and similar establishments. Nearly 55% of total nights were taken by guests from abroad. Compared to the previous year, foreign demand fell by 1.5%, while there was a rise in domestic demand of 1.2% resulting in a slight overall decrease of 0.3%.

The most important source market remains Germany, representing 17.6% of international arrivals; however, the number of nights taken by German guests has continued a downward trend in recent years, driven in part by the strong Swiss franc. Moreover, there has been a sharp decline in the number of nights attributable to guests from China (down 18% in 2016), after several years of sustained growth. Total nights spent in hotels and similar establishment by those from the Gulf States, the Republic of Korea and the United States increased in 2016.

Tourism governance and funding

The State Secretariat for Economic Affairs (SECO) is responsible for executing Swiss national tourism policy and for implementing the Federal Act on the Promotion of Innovation, Co-operation and Knowledge Building in Tourism (Innotour). Numerous political bodies at a national and regional level influence delivery of the policy, including various industry organisations.

The Confederation has two associations tasked with implementing various tourism-related measures:

- Switzerland Tourism (ST) carries out marketing activities relating to Swiss tourism. In February 2017, a completely revised regulation came into effect, enabling further development of Switzerland Tourism and strengthening the Confederation's supervisory role,
- The Swiss Society for Hotel Credit (SGH) supports investments in the accommodation sector and provides consultancy services at market prices.

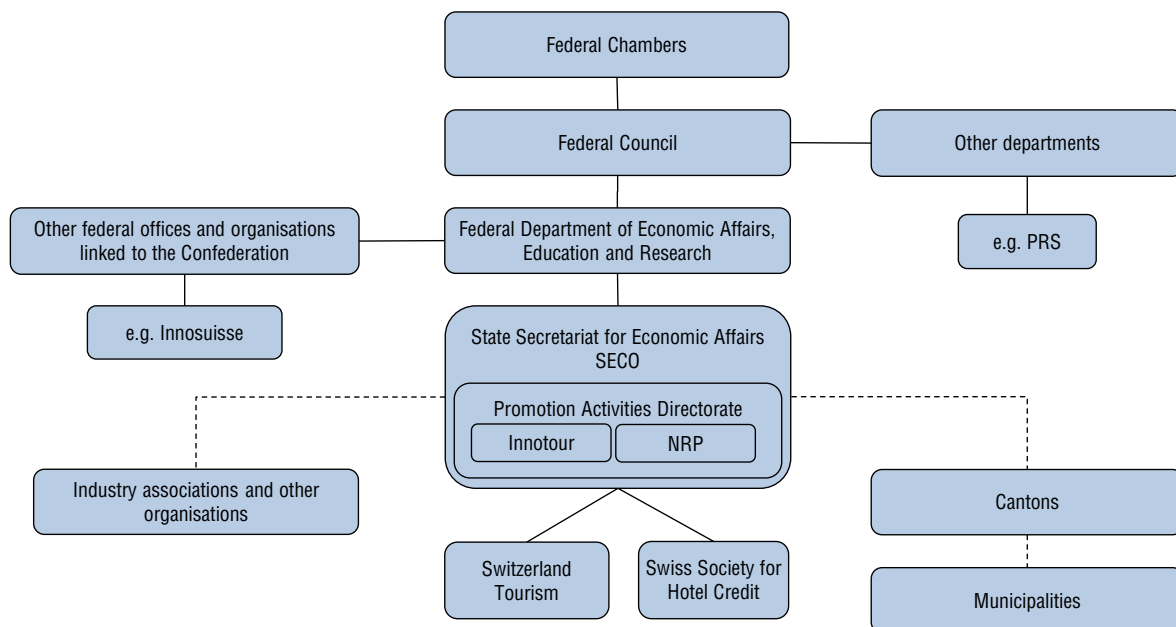
In 2016, CHF 60.6 million were available for national tourism policies. Of this, by far the largest part (CHF 52.7 million) was the contribution to Switzerland Tourism. CHF 7.5 million was available in 2016 for financing promotion of innovation, co-operation and knowledge building in tourism. This was higher than in previous years because an increase in funds of

CHF 2.5 million a year for the four years from 2016 to 2019 has been made available to Innotour as a result of the stimulus programme. Budgets available for information and documentation activities, and also contributions to international organisations such as UNWTO, were lower than in recent years, standing at approximately CHF 350 000.

The stimulus programme 2016-2019 also included CHF 200 million for the New Regional Policy (NRP).

The Swiss Society for Hotel Credit (SGH) is supported by the Confederation with an existing interest-free loan of around CHF 136 million. For the years 2012 – 2015, SGH was granted an additional loan amounting to CHF 100 million. However, the Confederation provided no additional funds for SGH in 2016. Rather, in order to strengthen SGH's financial scope, the additional loan to SGH was extended to 2019. By the end of 2016, SGH had used approximately CHF 43 million of the CHF 100 million loan.

Switzerland: Organisational chart of tourism bodies



Source: OECD, adapted from the State Secretariat for Economic Affairs (SECO), 2018.

Tourism policies and programmes

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

Swiss tourism is facing major challenges including the strong Swiss franc, increasing pressure on competitiveness, rapidly changing guest requirements and high standards in the area of digitalisation. In response to these challenges, political support for tourism has led to a package of tourism policy measures since 2013. These include optimising promotion of the hotel industry and a stimulus programme for 2016-2019.

In 2017, an interim evaluation of the stimulus programme was carried out. Optimising promotion of the hotel industry has included modernising implementation regulations, increasing the financial scope of SGH, and improving coordination between SGH and the

New Regional Policy (NRP). Implementation of the stimulus programme 2016-2019 under Innotour has been successfully initiated, with more than half of the increased funds already committed, and the quality of the projects considered impressive. Support for tourism under the New Regional Policy has started. However, demand for funds from the stimulus programme was restrained in the first year of implementation.

In 2017, Switzerland's Federal Council has adopted a new tourism strategy developed by SECO on behalf of the Federal Department of Economic Affairs, Education and Research (EAER). An advisory group has been established to guide and support the work of SECO and to ensure that the new tourism strategy has broad support. It comprises representatives from political interests, the tourism associations, the Swiss cantons, and academics, as well as selected actors and entrepreneurs from the tourism sector.

The new tourism strategy is the Federal Council's contribution to creating an internationally competitive tourism industry and transforming Switzerland into an attractive and productive tourism location. Policy is geared towards improving the framework conditions for providers in the tourism sector, seizing the opportunities of digitalisation, increasing promotion of entrepreneurship, and strengthening the attractiveness of the tourism offering and presence in the market. The four existing instruments, Innotour, ST, SGH and the NRP, are available for implementation of the tourism policy.

These are the main new aspects promoted by the Confederation's tourism strategy:

- Setting focal points: the new tourism strategy does not list all of the activities of the Confederation related to tourism. The cross-section nature of the tourism policy is particularly emphasised.
- Streamlining the use of funds: the existing funds are used in a more streamlined manner with closer co-operation with the projects, wherever useful and possible. The reconciliation of funding instruments is optimised to exploit synergies and prevent repeat actions.
- Digitalisation: the policy promotes the exploitation of the opportunities provided by digitalisation. It focuses on supporting the digital transformation of business processes and models as well as market cultivation.
- Focus on implementation: the new tourism strategy is designed with operations in mind, is flexible and contains specific implementation activities. As a result, it is possible to quickly adjust the tourism policy to meet changing requirements and conditions in the market if and when required.

The Confederation's tourism strategy consists of eight areas of activity with one or two sub-areas each. Coordination and co-operation is a key area of activity. The new tourism strategy strengthens the coordination of the Confederation's tourism policy, with the primary focus being to develop the *Tourismus Forum Schweiz* (Tourism Forum Switzerland) into a platform for dialogue and coordination. The aim is to create temporary, broadly diversified work groups comprised of representatives of the tourism industry, cantons, municipalities and Federal Administration. The topic- and project-specific co-operation within these work groups aims to identify targeted challenges and develop optional actions and approaches to solutions.

As previously mentioned, digitalisation plays a key role. One of the areas of activity therefore deals with the digital transformation of business processes and models. In 2017, SECO therefore launched an intensive digitisation campaign in the tourism industry, which boosts the required digital transformation of business processes and models in the tourism

industry. When implementing the new tourism strategy, the focus is to remain on heavily promoting digitisation projects and the transfer of knowledge. The activities focus on further developing existing data and statistics. The extrapolation and utilisation of new data (e.g. on the behaviour of guests) is also to be reviewed.

Similarly, the digital transformation of the market cultivation process is also a priority activity. Tourists' requirements change quickly and the number of marketing and diffusion channels is rising all the time, thus continuously increasing the challenges faced by marketing. The main focus is on the further development of the MySwitzerland web platform by Switzerland Tourism by 2019.

Statistical profile

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

	2012	2013	2014	2015	2016
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	70 140 |	76 635	76 000	78 050	76 374
Overnight visitors (tourists)	7 417 |	8 648	7 732	7 830	7 465
Same-day visitors (excursionists)	62 723 |	67 987	68 268	70 220	68 909
Nights in all types of accommodation	..	..	..	..	..
Hotels and similar establishments	15 690	15 889	16 026	16 052	16 245
Specialised establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	10 136
Private accommodation	..	..	..	..	..
Inbound tourism					
Total international arrivals	..	..	..	..	..
Overnight visitors (tourists)	8 566	8 967	9 158	9 305	10 402 |
Same-day visitors (excursionists)	..	..	..	..	..
Top markets					
Germany	1 871	1 854	1 812	1 616	2 018 |
China	635	770	891	1 210	982 |
United States	687	726	752	803	899 |
United Kingdom	659	698	712	710	800 |
France	669	692	699	655	773 |
Nights in all types of accommodation	..	..	..	..	..
Hotels and similar establishments	19 076	19 735	19 907	19 576	19 288
Specialised establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	4 728
Private accommodation	..	..	..	..	..
Outbound tourism					
Total international departures	..	..	..	..	..
Overnight visitors (tourists)	12 924 |	13 569	13 427	14 925	14 941
Same-day visitors (excursionists)	..	..	..	..	..
Top destinations					
Germany	3 053 |	2 952	2 639	2 939	2 980
Italy	2 091 |	1 951	2 557	2 808	2 730
France	2 042 |	2 247	2 003	2 244	1 913
Austria	949 |	981	1 019	1 091	960
TOURISM RECEIPTS AND EXPENDITURE, MILLION CHF					
Inbound tourism					
Total international receipts	18 393	18 871	19 603	18 880	18 915 p
International travel receipts	15 085	15 568	16 319	15 793	16 019 p
International passenger transport receipts	3 309	3 303	3 284	3 088	2 895 p
Outbound tourism					
Total international expenditure	16 885	17 704	18 254	18 048	18 549 p
International travel expenditure	14 256	14 977	15 444	15 675	16 271 p
International passenger transport expenditure	2 629	2 727	2 810	2 372	2 278 p

.. Not available; | Break in series; p Provisional data

Source: OECD Tourism Statistics (Database).



StatLink  <http://dx.doi.org/10.1787/888933641355>

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

	Number of establishments	Number of persons employed				
	2016	2012	2013	2014	2015	2016
Total	..	160 042	162 739	163 679	164 878	165 675 p
Tourism industries	..	123 042	125 215	125 918	126 644	126 994 p
Accommodation services for visitors	41 319	34 041	34 927	34 825	35 929	36 205 p
Hotels and similar establishments	4 949	30 845	31 637	31 453	35 929	36 205 p
Food and beverage serving industry	..	38 136	38 538	38 656	38 656	38 623 p
Passenger transport	..	25 504	25 967	26 229	25 926	26 068 p
Air passenger transport	..	6 882	7 093	7 214	6 693	6 830 p
Railways passenger transport	..	12 262	12 423	12 375	12 374	12 364 p
Road passenger transport	..	5 480	5 629	5 676	5 849	5 844 p
Water passenger transport	..	880	821	965	1 010	1 031 p
Passenger transport supporting services	..	3 482	3 521	3 515	3 454	3 438 p
Transport equipment rental	..	438	486	503	527	528 p
Travel agencies and other reservation services industry	..	13 132	13 102	13 249	13 006	13 020 p
Cultural industry	..	2 750	2 859	2 962	3 003	2 998 p
Sports and recreation industry	..	4 350	4 584	4 738	4 858	4 843 p
Retail trade of country-specific tourism characteristic goods
Other country-specific tourism industries	..	1 209	1 232	1 241	1 285	1 271 p
Other industries	..	36 999	37 524	37 761	38 233	38 681 p

.. Not available; p Provisional data

Source: OECD Tourism Statistics (Database).


StatLink  <http://dx.doi.org/10.1787/888933641374>Table 3. **Switzerland: Internal tourism consumption**

Million CHF

	2011		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
Total	26 659	19 644	49 079
Consumption products	18 811	16 466	38 053
Tourism characteristic products	15 691	14 238	32 438
Accommodation services for visitors	2 375	3 091	7 400
Food and beverage serving services	2 689	2 511	5 199
Passenger transport services	4 897	3 900	9 074
Air passenger transport services	2 568	3 045	5 613
Railways passenger transport services	1 501	488	2 266
Road passenger transport services	751	328	1 079
Water passenger transport services	77	39	116
Passenger transport supporting services	300	234	534
Transport equipment rental services	8	189	196
Travel agencies and other reservation services industry	4 339	3 522	8 049
Cultural services	43	94	246
Sports and recreation services	686	573	1 259
Country-specific tourism characteristic goods	..	..	..
Country-specific tourism characteristic services	355	125	480
Other consumption products	3 119	2 229	5 614
Tourism connected products	3 119	2 229	5 614
Non-tourism related consumption products	..	..	..
Non-consumption products	7 848	3 178	11 026

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888933641393>



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