

# Switzerland

## Tourism in the economy

In 2018, tourism contributed 2.9% to Swiss GDP and employed 181 700 people (full-time equivalents), corresponding to 4.4% of total employment. International travel receipts were CHF 16.6 billion, representing 4.1% of total exports. Travel exports accounted for 13.4% of total service exports in 2018.

In 2018, 11.7 million international tourists were recorded, registering 21.4 million overnight stays. This figure represents 55.1% of the national 38.8 million overnight stays registered in the hotel sector – a record high. Compared to the previous year, nights in hotel establishments by international tourists increased by 4.5%.

The most important foreign source market remains Germany, representing 18.9% of international overnight tourists. Between 2008 and 2017, the number of nights taken by German tourists dropped each year, driven in part by the strong Swiss franc. However, in 2018, the number of nights from Germany has increased (+6.9%). Another important trend is the number of overnight stays taken by tourists from the United States: from 2011 growth has been consistent, rising from 1.5 million to 2.3 million overnight stays in 2018, a 51% increase. Consequently, the United States now represents the second most important source market after Germany.

Domestic tourism has also shown growth each year since 2013, with a record high of 17.4 million nights in hotels and similar establishments 2018.

## Tourism governance and funding

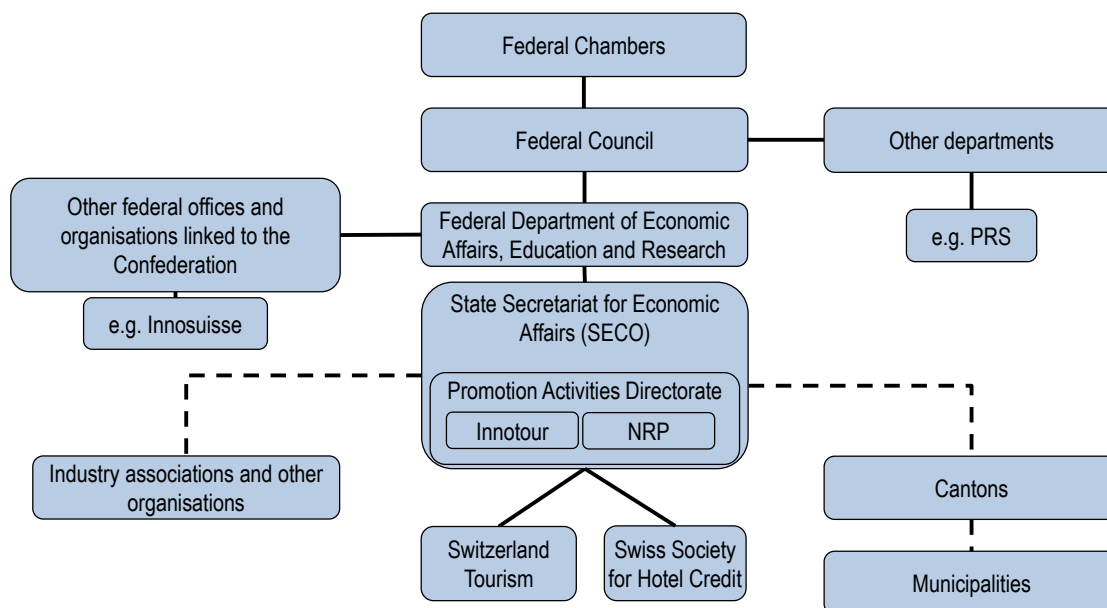
The State Secretariat for Economic Affairs (SECO) is responsible for the development and implementation of Switzerland's tourism policy. SECO enforces the Federal Act on the Promotion of Innovation, Co-operation and Knowledge Building in Tourism (Innotour) and supervises two associations tasked with implementing tourism measures: *Switzerland Tourism* carries out marketing activities relating to Swiss tourism and the *Swiss Society for Hotel Credit* supports investment in the accommodation sector.

Numerous political bodies at both national and regional levels influence the delivery of tourism policy, including various industry organisations. Federal tourism policy and its levers are subsidiary to the work of the cantons, local authorities and tourism-related industries. Maintaining dialogue within the Federal Administration, between the cantons and with tourist actors and associations is fundamental to the development of the industry. In that light, *Tourism Forum Switzerland (TFS)* was established to provide a platform for dialogue and co-ordination and allow co-operation across the sector. Broadly diversified, often temporary, working groups consisting of representatives of the private sector, cantons, communes and the Federal Administration, meet regularly to discuss current challenges and potential improvements. At the Forum's main event in November, the results of the working groups are gathered and presented, and the priorities for the following year are discussed.

In 2019, CHF 60.5 million were available for national tourism policies. Of this, CHF 52.8 million went to *Switzerland Tourism*. A further CHF 7.5 million was available for supporting Innotour. For the period 2020–

23, the Parliament has allocated about CHF 57.5 million annually for Switzerland Tourism and CHF 7.5 million for Innotour. The Swiss Society for Hotel Credit is supported by the Confederation with an existing interest-free long-term loan of some CHF 230 million.

### Switzerland: Organisational chart of tourism bodies



Source: OECD, adapted from the State Secretariat for Economic Affairs, 2020.

### Tourism policies and programmes

Swiss tourism is facing major challenges including rising costs, rapidly changing market trends, climate change, difficulties in recruitment and rising standards of digitalisation. To address these challenges, the Confederation published a new tourism strategy in 2017, with a vision for Switzerland to be an attractive and productive tourist destination with an internationally competitive tourism sector. For the years 2020 – 2023, the policy priority in Switzerland is the implementation of this tourism strategy. With a core focus on digital transformation, the strategy has four principal objectives:

- Improving the framework conditions for tourism. Prioritisation is geared towards improving the way in which the government's tourism policy is co-ordinated to maximise synergies. A second focus lies in providing a tourism-friendly regulatory environment. To do so, regulations will be streamlined where possible and processes and procedures at federal level simplified.
- Promoting entrepreneurship with a focus on increasing productivity, boosting workforce skills and competencies, supporting structural change and strengthening the tourism labour market.
- Exploiting the opportunities presented by the digital economy. A comprehensive study has analysed the challenges, opportunities and implications of digitalisation giving a robust basis for action. In 2019, Switzerland Tourism's new online platform MySwitzerland.com was launched. With its launch, an important goal set out in the tourism strategy has been achieved.
- Enhancing the attractiveness of the tourism offer and boosting market presence. The focus is on the development of large-scale sports and major MICE related events, such as world expos, as well as an assessment of the types of investment policies that can assist tourism.

Entrepreneurial thinking and action are decisive factors for successful tourism which is why promoting entrepreneurship is one of the main goals of the strategy. Collaboration with *Innosuisse*, the Swiss

Innovation Agency, has resulted in an analysis of how typical tourism businesses are formed and how they can best be supported. This identified the main challenges that companies in the tourism sector typically face in their start-up phase. Key messages from the analysis were that business creation stimulates competition and supports structural change, market failure justifies the State's support for entrepreneurship, and, in Switzerland, a comprehensive support system is already provided. Various recommendations were made for improvement: for example, to improve the clarity of and the accessibility to support instruments; to design support for business creation using a network approach; to anchor entrepreneurship into apprenticeships and other educational opportunities, and to improve statistical data related to business creation. On the basis of these recommendations, SECO developed various measures. One is strengthened co-operation between SECO and *Innosuisse*, to ensure that *Innosuisse*'s support is known and used by more of the private sector. Another step to boost business creation is to use Tourism Forum Switzerland as a platform for the promotion of start-up activities.

A Tourism Policy Advisory Group was established in 2017 to aid the development and implementation of the tourism strategy. The group, led by SECO, meets twice a year and serves as a sounding board. It has a balanced membership of entrepreneurs, tourism organisations, policy-makers and academics. The Group is informed about the state of current work, consulted regarding key activities and gives concrete advice as regards the development of future policy. The dialogue ensures that emerging trends and issues are fully understood and necessary policy action is taken.

### Analysing the impact of land-use regulations for tourism development in Switzerland

The increasing number and complexity of regulations covering numerous policy areas leads to administrative hurdles for tourism businesses. In order to counteract these hurdles and ensure that tourism can be successfully developed, one of the goals of the tourism strategy is to improve the framework conditions. Striving towards a tourism-friendly regulatory climate is therefore a key focus. Collaboration with the Tourism Policy Advisory Group, the SECO-led group that provides advice for the development of future policy, has revealed that regulations relating to land use planning play a particularly central role. In light of this, the State Secretariat for Economic Affairs commissioned a study to identify the most important issues for tourism projects in relation to the spatial planning regulations. This work aims to help both reduce the costs of regulation and the administrative burden currently faced by many tourism entrepreneurs and companies.

The study showed that, from the point of view of the tourism economy, there are four very important critical success factors namely: planning security, a short planning duration, business freedom and cost-effective processes. Collaboration with the relevant actors played a central role in reaching these conclusions: relevant authorities, cantonal representatives, experts and interested associations were fundamental to the success of the work. The aim now is to develop concrete policy measures that implement the findings and reduce the administrative burden on tourism businesses. These could include:

- Reducing the complexity of planning procedures to make it easier to take forward certain types of projects, such as the creation / refurbishment of mountain cable cars.
- Altering the weighting / importance of certain issues, to make the process more transparent and efficient and where appropriate giving greater weight to economic concerns (compared to, for example, concerns relating to the environment).

## Statistical Profile

### Switzerland: Domestic, inbound and outbound tourism

	2014	2015	2016	2017	2018
<b>TOURISM FLOWS, THOUSAND</b>					
<b>Domestic tourism<sup>1</sup></b>					
Total domestic trips	76 000	78 050	76 374	76 309	80 020
Overnight visitors (tourists)	7 732	7 830	7 465	8 231	8 201
Same-day visitors (excursionists)	68 268	70 220	68 909	68 078	71 819
Nights in all types of accommodation	..	..	26 381	27 768	28 573
Hotels and similar establishments	16 026	16 052	16 245	16 920	17 413
Other collective establishments	..	..	10 136	10 848	11 160
Private accommodation	..	..	..	..	..
<b>Inbound tourism</b>					
Total international arrivals	..	..	..	..	..
Overnight visitors (tourists)	9 158	9 305	10 402	11 133	11 715
Same-day visitors (excursionists)	..	..	..	..	..
Top markets					
Germany	1 812	1 616	2 018	2 072	2 216
China	891	1 210	982	1 062	1 135
United States	752	803	899	1 009	1 118
France	699	655	773	788	826
United Kingdom	712	710	800	808	820
Nights in all types of accommodation	..	..	24 016	25 515	26 784
Hotels and similar establishments	19 907	19 576	19 288	20 473	21 394
Other collective establishments	..	..	4 728	5 042	5 390
Private accommodation	..	..	..	..	..
<b>Outbound tourism</b>					
Total international departures	..	..	..	24 594	26 397
Overnight visitors (tourists)	13 427	14 925	14 941	16 650	16 735
Same-day visitors (excursionists)	..	..	..	7 944	9 662
Top destinations					
Germany	2 639	2 939	2 980	2 766	3 135
Italy	2 557	2 808	2 730	2 868	2 964
France	2 003	2 244	1 913	3 213	2 441
Austria	1 019	1 091	960	1 062	1 078
<b>TOURISM RECEIPTS AND EXPENDITURE, MILLION CHF</b>					
<b>Inbound tourism</b>					
Total international receipts	16 308	15 753	15 756	16 228	16 596
International travel receipts	16 308	15 753	15 756	16 228	16 596
International passenger transport receipts	..	..	..	..	..
<b>Outbound tourism</b>					
Total international expenditure	15 444	15 675	16 225	17 570	17 949
International travel expenditure	15 444	15 675	16 225	17 570	17 949
International passenger transport expenditure	..	..	..	..	..

.. Not available; | Break in series

1. Trips from demand side surveys; Nights from supply side surveys.

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934077996>

## Switzerland: Enterprises and employment in tourism

	Number of establishments	Number of persons employed				
	2018	2014	2015	2016	2017	2018
<b>Total</b>	..	<b>171 784</b>	<b>173 534</b>	<b>175 436</b>	<b>177 034</b>	<b>181 699 p</b>
<b>Tourism industries</b>	..	<b>136 950</b>	<b>138 606</b>	<b>140 315</b>	<b>141 697</b>	<b>146 019 p</b>
Accommodation services for visitors	39 057	36 211	34 886	35 233	35 419	35 780 p
Hotels and similar establishments	4 765	32 797	31 521	31 929	32 136	32 464 p
Food and beverage serving industry	..	42 398	45 800	46 897	46 356	48 302 p
Passenger transport	..	26 519	26 643	27 225	27 925	28 976 p
Air passenger transport	..	7 891	8 015	8 727	8 619	9 443 p
Railways passenger transport	..	12 914	12 748	12 550	13 196	13 294 p
Road passenger transport	..	4 814	4 936	5 040	5 161	5 199 p
Water passenger transport	..	899	944	908	950	1 041 p
Passenger transport supporting services	..	5 143	5 170	5 373	5 420	5 548 p
Transport equipment rental	..	514	535	531	543	560 p
Travel agencies and other reservation services industry	..	14 211	13 726	13 160	13 648	14 087 p
Cultural industry	..	3 675	3 683	3 670	3 896	4 038 p
Sports and recreation industry	..	6 120	6 066	6 181	6 471	6 702 p
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries	..	2 160	2 097	2 045	2 019	2 025 p
<b>Other industries</b>	..	<b>34 835</b>	<b>34 928</b>	<b>35 121</b>	<b>35 337</b>	<b>35 681 p</b>

.. Not available; p Provisional data

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934078015>

## Switzerland: Internal tourism consumption

Million CHF

	2014		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
<b>Total</b>	..	..	..
<b>Consumption products</b>	<b>13 983</b>	<b>16 692</b>	<b>33 582</b>
Tourism characteristic products	11 601	13 734	27 930
Accommodation services for visitors	2 846	2 590	7 411
Food and beverage serving services	2 715	2 871	5 587
Passenger transport services	4 519	5 063	9 873
Air passenger transport services	3 214	2 990	6 203
Railways passenger transport services	870	1 219	2 379
Road passenger transport services	405	772	1 177
Water passenger transport services	30	83	114
Passenger transport supporting services	331	434	765
Transport equipment rental services	110	143	253
Travel agencies and other reservation services industry	135	1 079	1 375
Cultural services	64	191	422
Sports and recreation services	752	844	1 596
Country-specific tourism characteristic goods	..	..	..
Country-specific tourism characteristic services	130	518	647
Other consumption products	5 902	9 473	15 687
Tourism connected products	2 382	2 959	5 652
Non-tourism related consumption products	3 521	6 514	10 035
<b>Non-consumption products</b>	..	..	..

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934078034>



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