

# Switzerland

## Tourism in the economy and outlook for recovery

In 2019, Switzerland recorded a historic high in tourism. At that time, the sector directly contributed 2.9% to the GVA and directly employed 173 703 people, with full-time equivalents corresponding to 4.2% of total employment. In 2020, tourism's contribution to GVA dropped to 2.2%, and direct employment fell to 162 766 (full-time equivalents), a 6.3% decrease.

In 2019, there were 11.8 million international tourists, which fell to 3.7 million in 2020. In 2021, there was a slight increase in demand, but international tourists still remained 63.0% below pre-pandemic levels at 4.4 million. The top source markets shifted to neighbouring countries. In 2021, Germany represented 33.1% of international overnight stays in Switzerland (compared to 18.8% in 2019), followed by France with 14.2% (7.0% in 2019).

The number of hotel nights fell by 40% to 23.7 million in 2020 (with international nights down 66% and domestic nights down just 8.6%). City tourism was particularly hard hit, with overnights plummeting by around 60% in 2020. Switzerland has recorded strong domestic tourism numbers, driven by its Alpine destinations. Total domestic tourist nights hit 34.3 million in 2021, a 16.8% increase compared to pre-pandemic levels.

An inbound tourism recovery to pre-COVID-19 levels is expected in 2023-24.

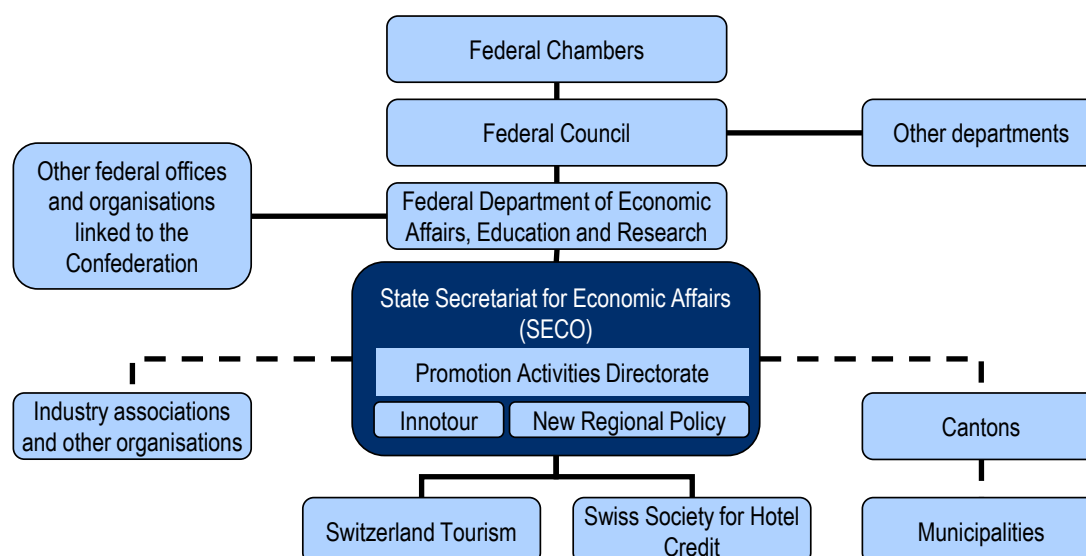
## Tourism governance and funding

The State Secretariat for Economic Affairs (SECO), interacting with numerous political bodies at a national and regional level, is responsible for designing and implementing Switzerland's tourism policy. SECO enforces the Federal Act on the Promotion of Innovation, Cooperation and Knowledge Building in Tourism (Innotour) and supervises two associations tasked with implementing various tourism-related measures: Switzerland Tourism carries out marketing activities relating to Swiss tourism, and the Swiss Society for Hotel Credit supports investment in the accommodation sector.

As tourism is an important economic contributor in many cantons, each has a tourism office with promotion carried out at the cantonal level. The Swiss Tourism Forum facilitates a close exchange between the central government, the cantons and tourism stakeholders. The central government and the cantons promote the mountain region, urban and rural areas and the border regions.

For the years 2020-23, the regular federal contribution to Switzerland Tourism amounts to CHF 230 million. CHF 30 million in regular funds is available over the same period via Innotour to promote innovation. The promotional activities of the Swiss Society for Hotel Credit (SGH) are based on a standing federal loan of CHF 236 million. Within the New Regional Policy framework, CHF 200 million in loans is available for investment and CHF 120 million for contributions to projects with regional economic impact.

## Switzerland: Organisational chart of tourism bodies



Source: OECD, adapted from the State Secretariat for Economic Affairs, 2022.

## Tourism policies and programmes

Switzerland approved the updated and renewed Tourism Strategy in November 2021. This Strategy draws on the previous tourism strategy and retains a number of objectives:

- **Improve framework conditions** focuses on the co-ordination of tourism policy. The Swiss Tourism Forum serves as a dialogue and co-ordination platform contributing to a ‘tourism-friendly’ regulatory environment, focusing on the interface between tourism and spatial planning.
- **Promote entrepreneurship:** aims to contribute to structural change in tourism. Start-ups are promoted, succession plans are supported, and approaches to strengthen the tourism labour market are developed in co-operation with industry associations.
- **Contribute to sustainable development:** focuses on adapting tourism to tackle climate change, particularly by better understanding the interface between tourism, landscape and development. Under the “Swisstainable” initiative, the importance of sustainable development for tourism is anchored more broadly.
- **Maximise the opportunities of digitalisation:** focuses on data and statistics as well as the monitoring of digitalisation strategy.
- **Strengthen the attractiveness of the offer and market presence:** focuses on the further development of federal investment promotion and the revitalisation of city and business tourism.

An Advisory Group consisting of tourism stakeholders and entrepreneurs, as well as political representatives, tourism associations, the cantons and the academic community, will oversee the implementation of the national Tourism Strategy.

Switzerland Tourism continues implementing a recovery plan in 2020-23 (see box below). The Federal Government is providing CHF 70 million for the programme in total (CHF 40 million for 2020-21 and CHF 30 million for 2022-23). Half of the funding will be used to provide financial relief to tourism partners. Through the New Regional Policy, Switzerland allowed the cantons to defer repayments under the Investment Assistance Act, which made it possible to support the mountain railway sector in the short term.

In addition, funds of CHF 10 million are made available for project promotion via the New Regional Policy for the period 2020-23.

The promotion of innovative projects in tourism through Innotour is also to be extended for the period 2023-26. The Federal Government's contribution to such projects will increase from 50% to a new maximum of 70%, reducing the costs for innovation in tourism to be borne by the project promoters. For this, the contribution of the Federal Government to Innotour will be increased by CHF 20 million.

In the coming years, Switzerland's tourism policy will be increasingly orientated towards the needs of tourism stakeholders, particularly tourism enterprises. Implementation of the strategy will focus on the identified challenges - in particular, the adaptation of tourism to climate change and raising the potential of the interface between tourism, landscape and building culture, and the issue of the tourism labour market. A further focus will be on developing federal investment promotion to modernise and strengthen investment promotion.

Strategic challenges for Swiss tourism in the long term include digitalisation, changing travel behaviour, climate change, below-average productivity and the tourism labour market. Digitalisation can help address the weakness of Swiss tourism (such as the low productivity of many micro-businesses) by increasing efficiency and promoting new forms of co-operation and co-ordination.

### Tourism Recovery Programme 2020-23 in Switzerland

Switzerland Tourism implemented a tourism recovery programme in 2020-23. The programme has four key actions:

- Recover international visitor numbers: to present Switzerland as a desirable tourist destination in international markets and to win back international visitors. The focus will be on local markets, individual travel, and small groups. In addition, the increased demand for land-based arrival will be considered, and corresponding offers will be created and promoted.
- Encourage sustainable tourism development: to establish Switzerland as a sustainable travel destination worldwide. Activities include the "Stay Longer" initiative to motivate guests to extend their stay. This can reduce the ecological footprint and, at the same time, increase added value. Another starting point for promoting sustainable development in Swiss tourism was created with the Swisstainable campaign. This is intended to promote sustainability-oriented product development and position Switzerland as the world's most sustainable travel destination.
- Revitalise city and business tourism: to focus on cities, positioning them as "City Nature Resorts". In this way, cities will also be marketed as a starting point for Swiss holidays. The planned activities should help replenish the cities with visitors and help city hotels achieve higher occupancy rates. At the same time, business tourism is to be stimulated to open up new market segments, for example, event concepts that have been reimagined due to the pandemic.
- Provide relief for tourism partners: financially support tourism partners, such as destinations. The lack of international guests led to a reduction in visitor tax revenue for destinations and a lower turnover for service providers. The financial support for tourism partners adds up to 50% of the additional federal government contribution of CHF 15 million. These relief payments enable tourism partners to participate in Switzerland Tourism's marketing campaigns despite reduced budgets.

## Statistical Profile


### Switzerland: Domestic, inbound and outbound tourism

	2017	2018	2019	2020	2021
<b>TOURISM FLOWS, THOUSAND</b>					
<b>Domestic tourism<sup>1</sup></b>					
Total domestic trips	76 309	80 020	78 317	62 951	..
Overnight visitors (tourists)	8 231	8 201	7 765	8 319	..
Same-day visitors (excursionists)	68 078	71 819	70 551	54 632	..
Nights in all types of accommodation	27 768	28 573	29 354	28 260	34 291
Hotels and similar establishments	16 920	17 413	17 922	16 389	20 961
Other collective establishments	10 848	11 160	11 432	11 871	13 331
Private accommodation	..	..	..	..	..
<b>Inbound tourism</b>					
Total international arrivals	..	..	..	..	..
Overnight visitors (tourists)	11 133	11 715	11 818	3 690	4 390
Same-day visitors (excursionists)	..	..	..	..	..
Top markets					
Germany	2 072	2 216	2 220	1 219	1 455
France	788	826	831	489	627
Italy	530	529	514	219	282
United States	1 009	1 118	1 219	167	279
United Kingdom	808	820	818	224	140
Nights in all types of accommodation	25 515	26 784	26 880	10 254	11 593
Hotels and similar establishments	20 473	21 394	21 640	7 341	8 598
Other collective establishments	5 042	5 390	5 241	2 913	2 995
Private accommodation	..	..	..	..	..
<b>Outbound tourism</b>					
Total international departures	24 594	26 397	21 360	8 319	..
Overnight visitors (tourists)	16 650	16 735	14 622	6 813	..
Same-day visitors (excursionists)	7 944	9 662	6 737	1 506	..
Top destinations					
Italy	2 868	2 964	2 594	1 487	..
Germany	2 766	3 135	2 816	1 474	..
France	3 213	2 441	1 885	1 178	..
Austria	1 062	1 078	940	629	..
..	..	..	..	..	..
<b>TOURISM RECEIPTS AND EXPENDITURE, MILLION CHF</b>					
<b>Inbound tourism</b>					
Total international receipts	20 053	20 820	21 118	9 416	11 054
International travel receipts	16 958	17 592	17 837	8 511 p	10 070
International passenger transport receipts	3 095	3 229	3 280	906	984
<b>Outbound tourism</b>					
Total international expenditure	21 136	20 985	20 963	9 751	11 578
International travel expenditure	18 774	18 650	18 635	8 974 p	10 675
International passenger transport expenditure	2 362	2 334	2 328	776	903

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

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

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/3kl7hp>

## Switzerland: Enterprises and employment in tourism

	Number of establishments	Number of persons employed				
	2021	2017	2018	2019	2020	2021
<b>Total</b>	..	<b>169 427</b>	<b>172 407</b>	<b>173 703</b>	<b>162 766</b>	..
<b>Tourism industries</b>	..	<b>137 449</b>	<b>139 894</b>	<b>140 793</b>	<b>132 243</b>	..
Accommodation services for visitors	36 755	35 385	36 409	35 747	33 371 p	..
Hotels and similar establishments	4 574	32 079	32 963	32 185	30 044 p	..
Food and beverage serving industry	..	42 967	43 913	44 219	40 016 p	..
Passenger transport	..	26 192	26 842	27 972	27 721	..
Air passenger transport	..	8 170	8 677	9 082	8 981 p	..
Railways passenger transport	..	12 954	13 037	13 414	13 310 p	..
Road passenger transport	..	4 246	4 243	4 460	4 425 p	..
Water passenger transport	..	821	885	1 017	1 005 p	..
Passenger transport supporting services	..	5 926	6 044	6 157	6 100 p	..
Transport equipment rental	..	627	630	570	545 p	..
Travel agencies and other reservation services industry	..	14 121	13 555	13 435	12 837 p	..
Cultural industry	..	3 896	3 950	3 984	3 932 p	..
Sports and recreation industry	..	6 198	6 452	6 597	6 486 p	..
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries	..	2 139	2 100	2 112	1 236 p	..
<b>Other industries</b>	..	<b>31 978</b>	<b>32 513</b>	<b>32 910</b>	<b>30 523</b>	..

.. Not available; p Provisional data

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/h1lzjb>


## Switzerland: Internal tourism consumption

Million CHF

	2017		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
<b>Total</b>	<b>24 251</b>	<b>17 020</b>	<b>46 360</b>
<b>Consumption products</b>	<b>19 421</b>	<b>14 147</b>	<b>38 657</b>
Tourism characteristic products	16 912	12 123	33 723
Accommodation services for visitors	2 617	2 774	9 417
Food and beverage serving services	3 666	2 752	6 417
Passenger transport services	5 990	4 196	10 478
Air passenger transport services	3 897	2 789	6 686
Railways passenger transport services	1 351	861	2 504
Road passenger transport services	640	507	1 146
Water passenger transport services	102	39	141
Passenger transport supporting services	453	371	824
Transport equipment rental services	218	207	425
Travel agencies and other reservation services industry	1 233	187	1 572
Cultural services	496	177	890
Sports and recreation services	1 701	1 356	3 057
Country-specific tourism characteristic goods	..	..	..
Country-specific tourism characteristic services	540	103	643
Other consumption products	7 339	4 897	12 637
Tourism connected products	2 509	2 024	4 934
Non-tourism related consumption products	4 830	2 872	7 703
<b>Non-consumption products</b>	..	..	..

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/dzw47i>



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