# Research Report France.

Tourism goals: summary

**Market size & growth:** In 2019, the French market recorded 1.277 million overnights[1] in Switzerland and 1.312 million overnights in 2022. With a market share of 3.23%, France was the 6th highest ranked source market (out of a total of 33 ST markets) in 2019. The growth rate for overnights was 1.8% between 2015 and 2019. Between 2019 and 2022, the development was 2.8%. The corresponding growth ranking was 26 and 7 respectively.

**Economic value:** France ranks 29th with a daily expenditure value of CHF 130 (TMS 2017) and ranks 24th with a 37.8% share of ****/**** nights in 2019.

**First time visitors & length of stay:** With a 18.8% figure for first-time visitors, France ranks 28th (TMS 2017). With a length of stay of 1.76 overnights it ranks 30th.

**Balance:** In 2019, the 50 largest Swiss destinations accounted for 58.7% of overnights from France, while the percentage split amongst the small[2] and very small[3] destinations was 26.4% (=rank 2) and 14.9% (=rank 7) respectively. Finally, the percentage split of the low season months "March-May" and "September-November" was 24.0% (=rank 15) and 21.3% (=rank 18), respectively.

[1] nights in hotels, unless otherwise stated
[2] 51st -200th largest destinations
[3] 201st largest destination and smaller

|  |  | value | rank |
|---|---|---|---|
| 1. market size & growth | 2019 | 1.277 M. | 6 |
|  | 2022 | 1.312 M. | 5 |
|  | 2015-19 | 1.8% | 26 |
|  | 2019-22 | 2.8% | 7 |
| 2. economic value | daily expenditures 2017 (TMS) | 130 | 29 |
|  | share ****/*****-nights 2019 | 37.8% | 24 |
| 3. first time visitors | share 2017 (TMS) | 18.8% | 28 |
| 4. length of stay | 2019 | 1.76 | 30 |
| 5. balance | share off-season "March-May" of total year 2019 | 24.0% | 15 |
|  | share off-season "Sept-Nov" of total year 2019 | 21.3% | 18 |
|  | share small destinations (51st -200th largest) 2019 | 26.4% | 2 |
|  | share very small destinations (201st+) 2019 | 14.9% | 7 |

Source: FSO/hotel statistics, unless otherwise stated

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**Regions and destinations with a high market affinity:** In 2019, guests from France typically preferred the regions of: Waadt, Jura & Drei-Seen-Land and Genf. Moreover, these guests were most overrepresented in the five destinations of: Lavey-Morcles, Orsières, La Chaux-de-Fonds, Champéry and Crissier.

Source: FSO/hotel statistics

## Overnight volume & development.

France
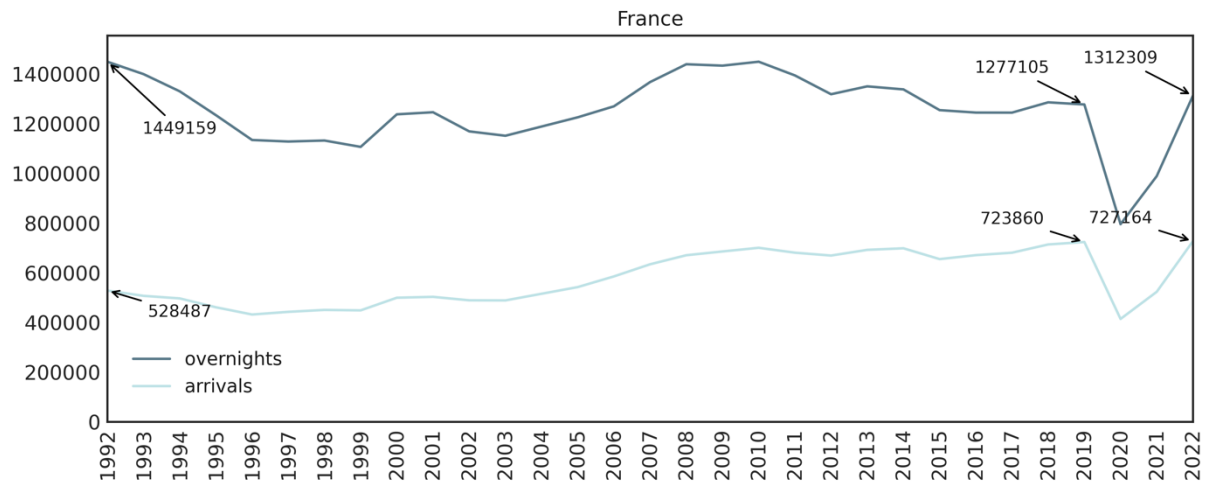


| overnights share of... | 2010 | 2015 | 2019 | 2021 | 2022 | rank 2019 |
|---|---|---|---|---|---|---|
| ...all markets | 4.0% | 3.5% | 3.2% | 3.3% | 3.4% | 6 |
| ...markets abroad | 7.1% | 6.4% | 5.9% | 11.5% | 7.6% | 5 |
| ...nearby markets (Europe, excl. CH) | 9.5% | 10.6% | 10.4% | 14.4% | 11.8% | 3 |

Source: FSO/hotel statistics

## Other key metrics.

| | 2010 | 2015 | 2019 | 2021 | 2022 | rank 2019 | development 2015-19 | rank 2015-19 | development 2019-22 | rank 2019-22 |
|---|---|---|---|---|---|---|---|---|---|---|
| overnights in millions | 1.449 | 1.254 | 1.277 | 0.989 | 1.312 | 6 | 1.8% | 26 | 2.8% | 7 |
| length of stay (overnigths/arrivals) | 2.069 | 1.915 | 1.764 | 1.889 | 1.805 | 31 | -16.5% | 33 | 5.3% | 19 |
| density (overnights/1'000 inhabitants) | 22.345 | 18.844 | 18.986 | 14.601 | 19.333 | 12 | 0.8% | 25 | 1.8% | 7 |
| GDP per capita in USD | 40'763 | 36'662 | 40'614 | 43'649 | 40'301 | 17 | 10.8% | 24 | -0.8% | 29 |
| population in millions | 64.859 | 66.571 | 67.267 | 67.735 | 67.878 | 11 | 1.0% | 27 | 0.9% | 19 |

Source: FSO/hotel statistics | Oxford Economics: GDP & population

## Guest origin.
(leisure tourists in Swiss hotels & supplementary accommodations)
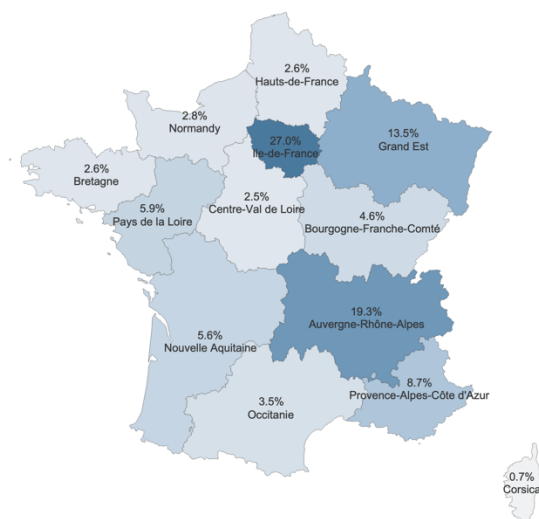


| | overnight-share | inhabitant-share |
|---|---|---|
| Ile-de-France | 27.0% | 17.9% |
| Auvergne-Rhône-Alpes | 19.3% | 11.5% |
| Grand Est | 13.5% | 8.1% |
| Provence-Alpes-Côte d'Azur | 8.7% | 7.3% |
| Pays de la Loire | 5.9% | 5.4% |
| Nouvelle Aquitaine | 5.6% | 8.6% |
| Bourgogne-Franche-Comté | 4.6% | 4.1% |
| Occitanie | 3.5% | 8.4% |
| Normandy | 2.8% | 4.9% |
| Britany | 2.6% | 4.8% |
| Hauts-de-France | 2.6% | 11.6% |
| Centre-Val de Loire | 2.5% | 3.8% |
| Corsica | 0.7% | 0.5% |
| Réunion | 0.3% | 1.2% |
| source: | TMS 2017 | public source |

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# Geographical distribution in Switzerland.

## Total

| | overnights in millons | | | | | ON share | rank | ON development | rank | ON development | rank |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2019 | 2021 | 2022 | 2019 | 2019 | 2015-19 | 2015-19 | 2019-22 | 2019-22 |
| total | 1.449 | 1.254 | 1.277 | 0.989 | 1.312 | 3.2% | 6 | 1.8% | 26 | 2.8% | 7 |

## Large vs. small destinations

| | overnights in millons | | | | | ON share | rank | ON development | rank | ON development | rank |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2019 | 2021 | 2022 | 2019 | 2019 | 2015-19 | 2015-19 | 2019-22 | 2019-22 |
| large destinations (top 10) | 0.522 | 0.460 | 0.512 | 0.401 | 0.539 | 3.6% | 6 | 11.4% | 20 | 5.2% | 6 |
| mid-sized destinations (11-50) | 0.330 | 0.269 | 0.264 | 0.227 | 0.288 | 2.4% | 7 | -1.9% | 27 | 9.1% | 7 |
| small destinations (51-200) | 0.409 | 0.363 | 0.340 | 0.240 | 0.324 | 3.8% | 4 | -6.4% | 30 | -4.6% | 6 |
| very small destinations (201-smallest) | 0.188 | 0.162 | 0.161 | 0.120 | 0.161 | 3.2% | 3 | -0.8% | 18 | -0.1% | 12 |

## Tourism zone

| | overnights in millons | | | | | ON share | rank | ON development | rank | ON development | rank |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2019 | 2021 | 2022 | 2019 | 2019 | 2015-19 | 2015-19 | 2019-22 | 2019-22 |
| big cities | 0.550 | 0.530 | 0.583 | 0.418 | 0.611 | 4.8% | 5 | 10.0% | 22 | 4.8% | 6 |
| mountain | 0.558 | 0.418 | 0.369 | 0.332 | 0.379 | 2.2% | 7 | -11.5% | 32 | 2.5% | 10 |
| rural | 0.115 | 0.101 | 0.109 | 0.074 | 0.100 | 3.2% | 3 | 8.3% | 13 | -8.5% | 9 |
| small cities | 0.226 | 0.206 | 0.215 | 0.165 | 0.222 | 3.0% | 6 | 4.5% | 26 | 3.3% | 5 |

## Language zone

| | overnights in millons | | | | | ON share | rank | ON development | rank | ON development | rank |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2019 | 2021 | 2022 | 2019 | 2019 | 2015-19 | 2015-19 | 2019-22 | 2019-22 |
| French speaking area | 0.814 | 0.703 | 0.709 | 0.567 | 0.730 | 8.6% | 2 | 0.9% | 29 | 3.0% | 5 |
| German speaking area | 0.582 | 0.509 | 0.522 | 0.385 | 0.534 | 1.8% | 7 | 2.6% | 25 | 2.3% | 8 |
| Italian speaking area | 0.049 | 0.039 | 0.042 | 0.035 | 0.045 | 1.7% | 5 | 7.3% | 19 | 5.9% | 9 |
| Rhaeto Romanic language zone | 0.004 | 0.003 | 0.003 | 0.002 | 0.003 | 0.5% | 7 | 12.6% | 8 | -2.8% | 15 |

## Tourism region

| | overnights in millons | | | | | ON share | rank | ON development | rank | ON development | rank |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2019 | 2021 | 2022 | 2019 | 2019 | 2015-19 | 2015-19 | 2019-22 | 2019-22 |
| Waadt | 0.345 | 0.289 | 0.270 | 0.197 | 0.257 | 9.1% | 2 | -6.6% | 30 | -4.8% | 4 |
| Genf | 0.246 | 0.232 | 0.255 | 0.205 | 0.296 | 8.0% | 3 | 9.9% | 17 | 16.0% | 2 |
| Wallis | 0.246 | 0.176 | 0.178 | 0.169 | 0.170 | 4.2% | 5 | 1.4% | 28 | -4.9% | 15 |
| Zürich Region | 0.136 | 0.140 | 0.138 | 0.077 | 0.132 | 2.1% | 9 | -1.4% | 24 | -4.9% | 13 |
| Bern Region | 0.128 | 0.102 | 0.103 | 0.093 | 0.125 | 1.9% | 9 | 0.5% | 30 | 21.6% | 8 |
| Basel Region | 0.056 | 0.058 | 0.063 | 0.038 | 0.054 | 3.7% | 5 | 7.9% | 23 | -13.3% | 10 |
| Graubünden | 0.071 | 0.052 | 0.055 | 0.043 | 0.056 | 1.0% | 9 | 5.7% | 25 | 2.3% | 9 |
| Luzern / Vierwaldstättersee | 0.049 | 0.046 | 0.050 | 0.042 | 0.058 | 1.3% | 13 | 8.0% | 18 | 15.4% | 5 |
| Jura & Drei-Seen-Land | 0.046 | 0.048 | 0.045 | 0.037 | 0.046 | 8.1% | 2 | -7.1% | 26 | 1.9% | 5 |
| Tessin | 0.047 | 0.038 | 0.041 | 0.034 | 0.043 | 1.8% | 5 | 6.5% | 19 | 5.8% | 8 |
| Fribourg Region | 0.032 | 0.032 | 0.038 | 0.026 | 0.036 | 7.9% | 2 | 18.1% | 11 | -7.2% | 5 |
| Aargau und Solothurn Region | 0.021 | 0.018 | 0.021 | 0.013 | 0.019 | 1.9% | 7 | 13.5% | 12 | -8.6% | 14 |
| Ostschweiz | 0.025 | 0.022 | 0.021 | 0.015 | 0.022 | 1.1% | 7 | -4.5% | 21 | 6.5% | 5 |

Source: FSO/hotel statistics

*Example: Tourists from France generate the most overnight stays in Waadt of any Swiss region, namely 0.27 million in 2019 (the table is sorted by the total number of 2019 overnight stays, thus Waadt appears at the top of the list). From Waadt's perspective, 9.1% of their total tourism volume comes from France, making this source market the 2nd most important market for this region (out of 33 ST markets overall). With a -6.6% development in overnight stays between 2015 and 2019, France ranks 30th. In other words, in reference to the development of overnight stays, 29 other source markets had a stronger performance and 3 had a weaker performance.*
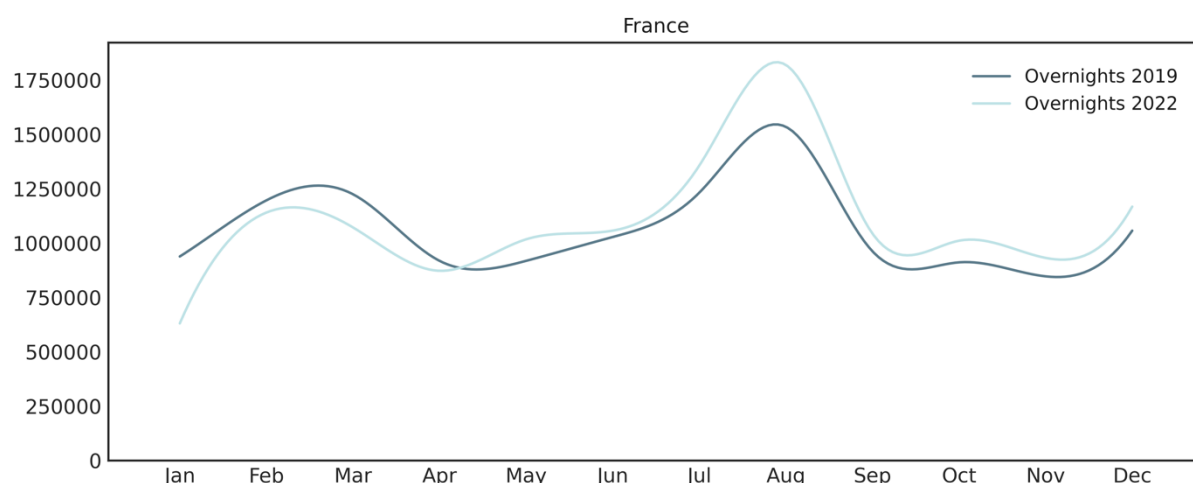
## Top 50 destinations

| overnights | overnights in millons | | | | | ON share | | | ON development | | ON development | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 2010 | 2015 | 2019 | 2021 | 2022 | 2019 | rank 2019 | | 2015-19 | rank 2015-19 | 2019-22 | rank 2019-22 |
| Genève | 0.176 | 0.163 | 0.169 | 0.15 | 0.197 | 7.7% | 5 | | 3.7% | 24 | 16.8% | 3 |
| Lausanne | 0.103 | 0.071 | 0.096 | 0.069 | 0.096 | 9.7% | 2 | | 34.5% | 19 | 0.3% | 8 |
| Zürich | 0.075 | 0.077 | 0.085 | 0.049 | 0.077 | 2.3% | 9 | | 10.2% | 19 | -9.8% | 14 |
| Basel | 0.048 | 0.051 | 0.057 | 0.035 | 0.05 | 4.0% | 5 | | 11.3% | 26 | -13.0% | 14 |
| Zermatt | 0.045 | 0.033 | 0.035 | 0.037 | 0.039 | 2.3% | 7 | | 6.2% | 25 | 9.8% | 14 |
| Montreux | 0.033 | 0.027 | 0.028 | 0.027 | 0.031 | 5.7% | 5 | | 2.6% | 25 | 10.8% | 6 |
| Le Grand-Saconnex | 0.013 | 0.014 | 0.025 | 0.014 | 0.025 | 11.5% | 2 | | 77.3% | 22 | -1.2% | 10 |
| Meyrin | 0.025 | 0.024 | 0.025 | 0.017 | 0.039 | 5.8% | 4 | | 1.4% | 11 | 59.9% | 4 |
| Bern | 0.02 | 0.019 | 0.024 | 0.018 | 0.026 | 2.9% | 6 | | 26.6% | 15 | 9.6% | 8 |
| Crans-Montana | 0.028 | 0.019 | 0.018 | 0.02 | 0.018 | 7.6% | 2 | | -5.9% | 20 | 2.6% | 17 |
| Saanen | 0.021 | 0.017 | 0.017 | 0.017 | 0.016 | 4.8% | 3 | | 0.7% | 27 | -5.9% | 9 |
| St. Moritz | 0.021 | 0.017 | 0.017 | 0.016 | 0.019 | 2.3% | 10 | | 1.2% | 29 | 9.2% | 15 |
| Luzern | 0.019 | 0.016 | 0.017 | 0.015 | 0.019 | 1.2% | 14 | | 7.9% | 20 | 11.0% | 8 |
| Bussigny | 0.01 | 0.02 | 0.016 | 0.013 | 0.017 | 16.4% | 2 | | -16.2% | 18 | 4.3% | 14 |
| Neuchâtel | 0.013 | 0.014 | 0.014 | 0.013 | 0.019 | 11.1% | 2 | | -3.5% | 26 | 37.6% | 7 |
| Lugano | 0.016 | 0.012 | 0.012 | 0.011 | 0.013 | 2.4% | 8 | | 6.7% | 21 | 8.0% | 16 |
| Val de Bagnes | 0.014 | 0.011 | 0.012 | 0.024 | 0.014 | 7.0% | 3 | | 7.9% | 20 | 12.9% | 9 |
| Lancy | 0.009 | 0.011 | 0.012 | 0.006 | 0.009 | 8.8% | 2 | | 7.7% | 11 | -27.1% | 7 |
| Opfikon | 0.014 | 0.018 | 0.012 | 0.006 | 0.012 | 1.6% | 11 | | -33.7% | 29 | 0.2% | 10 |
| Grindelwald | 0.014 | 0.01 | 0.012 | 0.012 | 0.015 | 1.8% | 10 | | 15.0% | 22 | 31.2% | 17 |
| Orsières | 0.017 | 0.011 | 0.011 | 0.01 | 0.011 | 21.4% | 2 | | -1.6% | 26 | 5.5% | 6 |
| Fribourg | 0.008 | 0.008 | 0.011 | 0.006 | 0.007 | 8.5% | 2 | | 36.6% | 6 | -35.1% | 5 |
| Crissier | 0.008 | 0.01 | 0.01 | 0.006 | 0.006 | 13.9% | 2 | | -2.5% | 21 | -41.3% | 13 |
| Vevey | 0.012 | 0.01 | 0.01 | 0.006 | 0.009 | 9.4% | 2 | | 0.6% | 18 | -11.1% | 10 |
| Champéry | 0.011 | 0.013 | 0.009 | 0.007 | 0.01 | 15.7% | 2 | | -24.7% | 25 | 2.8% | 18 |
| Vernier | 0.013 | 0.009 | 0.009 | 0.006 | 0.008 | 7.1% | 4 | | -2.2% | 19 | -14.8% | 6 |
| Martigny | 0.01 | 0.007 | 0.009 | 0.008 | 0.01 | 9.8% | 2 | | 24.2% | 22 | 17.2% | 8 |
| Lauterbrunnen | 0.026 | 0.021 | 0.009 | 0.008 | 0.011 | 1.6% | 10 | | -58.3% | 33 | 27.0% | 7 |
| Lavey-Morcles | 0.004 | 0.006 | 0.009 | 0.007 | 0.008 | 25.8% | 2 | | 55.6% | 16 | -3.2% | 9 |
| Yverdon-les-Bains | 0.004 | 0.007 | 0.008 | 0.006 | 0.009 | 13.0% | 2 | | 18.8% | 9 | 1.8% | 14 |
| Leytron | 0.011 | 0.009 | 0.008 | 0.006 | 0.005 | 10.9% | 2 | | -5.9% | 17 | -32.9% | 10 |
| Morges | 0.008 | 0.006 | 0.007 | 0.004 | 0.005 | 12.6% | 2 | | 16.9% | 10 | -32.6% | 9 |
| Saas-Fee | 0.012 | 0.009 | 0.007 | 0.006 | 0.005 | 2.2% | 7 | | -25.9% | 29 | -33.4% | 13 |
| Chavannes-de-Bogis | 0.005 | 0.004 | 0.007 | 0.005 | 0.008 | 11.8% | 2 | | 83.3% | 4 | 9.7% | 7 |
| Ollon | 0.074 | 0.057 | 0.007 | 0.006 | 0.008 | 7.9% | 2 | | -88.5% | 31 | 16.6% | 13 |
| Anniviers | 0.01 | 0.006 | 0.007 | 0.004 | 0.005 | 4.1% | 3 | | 7.9% | 23 | -22.4% | 20 |
| La Chaux-de-Fonds | 0.005 | 0.006 | 0.006 | 0.004 | 0.005 | 19.3% | 2 | | 12.9% | 19 | -27.1% | 14 |
| Interlaken | 0.008 | 0.006 | 0.006 | 0.009 | 0.011 | 0.8% | 18 | | -3.5% | 26 | 76.8% | 4 |
| Leukerbad | 0.01 | 0.006 | 0.006 | 0.005 | 0.005 | 2.7% | 3 | | -0.2% | 22 | -19.7% | 12 |
| Davos | 0.008 | 0.006 | 0.006 | 0.005 | 0.006 | 0.7% | 10 | | -5.9% | 22 | 2.9% | 5 |
| Saillon | 0.003 | 0.002 | 0.006 | 0 | 0.001 | 9.6% | 2 | | 130.0% | 19 | -79.5% | 18 |
| Leysin | 0.007 | 0.006 | 0.005 | 0.002 | 0.002 | 2.5% | 5 | | -5.5% | 12 | -58.6% | 12 |
| Nyon | 0.006 | 0.004 | 0.005 | 0.004 | 0.006 | 10.0% | 3 | | 23.9% | 25 | 15.6% | 7 |
| Paradiso | 0.004 | 0.005 | 0.005 | 0.005 | 0.005 | 2.9% | 6 | | 2.1% | 17 | -2.4% | 12 |
| Biel/Bienne | 0.006 | 0.005 | 0.005 | 0.004 | 0.005 | 5.3% | 4 | | 9.0% | 23 | -12.7% | 7 |
| Carouge (GE) | 0 | 0 | 0.005 | 0.004 | 0.007 | 13.4% | 2 | | 1339.3% | 18 | 33.9% | 12 |
| Winterthur | 0.008 | 0.005 | 0.005 | 0.002 | 0.004 | 2.3% | 7 | | 3.2% | 17 | -17.1% | 13 |
| Sion | 0.007 | 0.005 | 0.005 | 0.004 | 0.006 | 7.0% | 2 | | 8.4% | 22 | 22.2% | 18 |
| Ecublens (VD) | 0 | 0.005 | 0.005 | 0.003 | 0.002 | 13.0% | 2 | | -0.9% | 15 | -49.2% | 14 |
| Bulle | 0.002 | 0.007 | 0.005 | 0.004 | 0.007 | 10.5% | 2 | | -25.4% | 16 | 47.0% | 15 |

Source: FSO/hotel statistics

*How to read this table: see reading example on page 3.*

# Seasonal distribution.



France

## Summer, winter

| | overnights in millons | | | | | ON share | | ON development | | ON development | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | rank | | rank | | rank |
| | 2010 | 2015 | 2019 | 2021 | 2022 | 2019 | 2019 | 2015-19 | 2015-19 | 2019-22 | 2019-22 |
| summer (May-Oct) | 0.742 | 0.628 | 0.659 | 0.585 | 0.731 | 2.9% | 6 | 4.9% | 28 | 10.9% | 5 |
| winter (Nov-April) | 0.707 | 0.626 | 0.618 | 0.404 | 0.582 | 3.7% | 5 | -1.3% | 26 | -5.9% | 8 |

## Summer core, winter core, off-season

| | overnights in millons | | | | | ON share | | ON development | | ON development | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | rank | | rank | | rank |
| | 2010 | 2015 | 2019 | 2021 | 2022 | 2019 | 2019 | 2015-19 | 2015-19 | 2019-22 | 2019-22 |
| off-season I (March-May) | 0.334 | 0.289 | 0.306 | 0.155 | 0.296 | 3.4% | 6 | 6.1% | 23 | -3.2% | 4 |
| off-season II (Sept-Nov) | 0.284 | 0.253 | 0.272 | 0.280 | 0.299 | 3.1% | 6 | 7.5% | 22 | 9.8% | 8 |
| summer core months (Jun-Aug) | 0.445 | 0.362 | 0.380 | 0.336 | 0.423 | 2.9% | 7 | 4.8% | 26 | 11.6% | 6 |
| winter core months (Dez-Feb) | 0.386 | 0.350 | 0.319 | 0.218 | 0.294 | 3.6% | 5 | -8.9% | 27 | -7.9% | 10 |

## Months

| | overnights in millons | | | | | ON share | | ON development | | ON development | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | rank | | rank | | rank |
| | 2010 | 2015 | 2019 | 2021 | 2022 | 2019 | 2019 | 2015-19 | 2015-19 | 2019-22 | 2019-22 |
| January | 0.102 | 0.102 | 0.094 | 0.051 | 0.063 | 3.3% | 5 | -7.7% | 27 | -32.8% | 10 |
| February | 0.169 | 0.144 | 0.120 | 0.068 | 0.114 | 3.8% | 4 | -16.9% | 28 | -4.7% | 4 |
| March | 0.140 | 0.121 | 0.122 | 0.052 | 0.107 | 3.7% | 5 | 1.2% | 25 | -12.5% | 7 |
| April | 0.100 | 0.082 | 0.092 | 0.048 | 0.087 | 3.4% | 6 | 11.6% | 21 | -5.0% | 8 |
| May | 0.094 | 0.085 | 0.092 | 0.055 | 0.102 | 3.1% | 7 | 7.7% | 23 | 10.8% | 7 |
| June | 0.110 | 0.096 | 0.103 | 0.061 | 0.106 | 2.7% | 7 | 6.8% | 25 | 2.8% | 6 |
| July | 0.150 | 0.121 | 0.123 | 0.104 | 0.136 | 2.7% | 7 | 1.6% | 27 | 10.1% | 8 |
| August | 0.185 | 0.145 | 0.154 | 0.171 | 0.182 | 3.4% | 7 | 6.1% | 26 | 18.6% | 3 |
| September | 0.107 | 0.092 | 0.096 | 0.100 | 0.104 | 2.6% | 6 | 4.2% | 25 | 8.5% | 11 |
| October | 0.096 | 0.088 | 0.091 | 0.094 | 0.101 | 3.0% | 6 | 3.6% | 26 | 10.9% | 10 |
| November | 0.081 | 0.073 | 0.085 | 0.086 | 0.093 | 4.1% | 5 | 16.5% | 11 | 10.0% | 7 |
| December | 0.115 | 0.105 | 0.106 | 0.100 | 0.117 | 3.7% | 5 | 1.0% | 29 | 10.4% | 12 |

Source: FSO/hotel statistics

*How to read these tables: see reading example on page 3.*

## Structural facts of leisure travelers.
(leisure tourists in Swiss hotels & supplementary accommodations)

| age | | accommodation | | touring | | through CH border | |
|---|---|---|---|---|---|---|---|
| 16-34 years | 34.0% | hotel | 27.7% | no | 71.0% | plane | 10.3% |
| 35-54 years | 43.1% | suppl. acc. | 72.3% | yes with 1 CH-Dest. | 5.4% | train | 18.1% |
| 55+ years | 22.9% | | | yes with 2+ CH-Dest. | 23.6% | other | 71.5% |

source: TMS 2017

## Guest segments.
(leisure tourists in Swiss hotels & supplementary accommodations, single choice)

22.9% nature lover

17.2% outdoor enthusiast

16.0% attractions tourer

13.4% snow sports enthusiast

9.3% family traveller

8.0% snow lover

4.6% culture traveller

3.8% spa & vitality guest

1.6% city breaker

1.3% luxury traveller

1.8% none
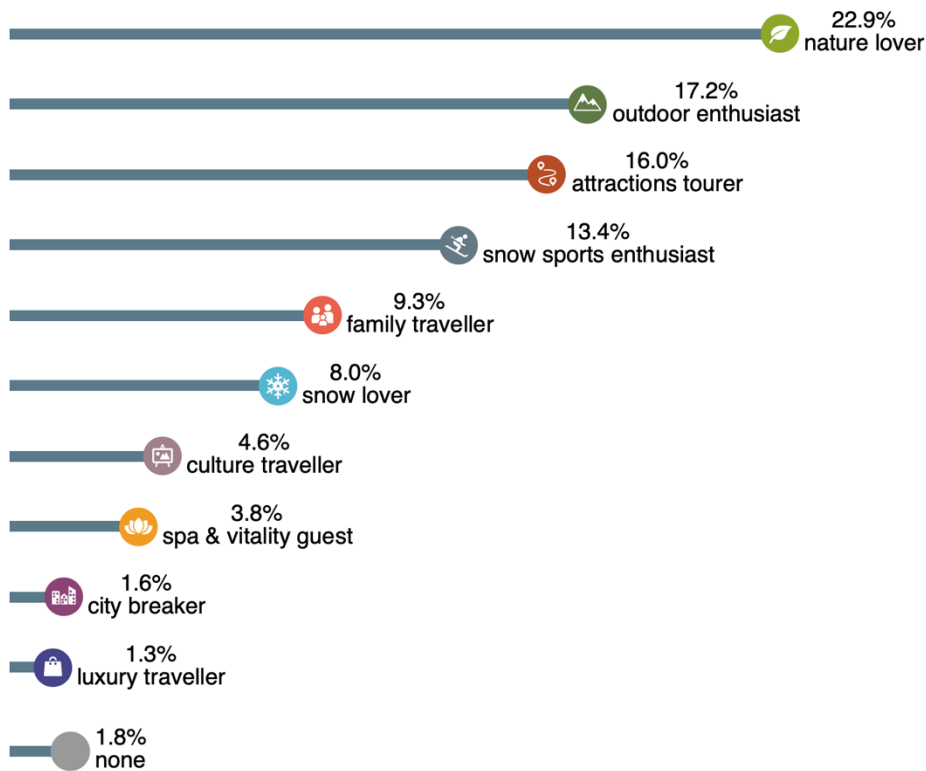
source: TMS 2017

## Main travel reasons for Switzerland travelers.

(leisure tourists in Swiss hotels & supplementary accommodations, single choice)

| | | |
|---|---|---|
| 1 | quiet | 7.9% |
| 2 | mountains | 7.0% |
| 3 | panorama | 6.1% |
| 4 | relaxation | 6.0% |
| 5 | family-friendly | 5.6% |
| 6 | alpine skiing | 4.6% |
| 7 | nature | 3.6% |
| 8 | hiking (at least 2 hours walking) | 3.5% |
| 9 | historical experience | 3.5% |
| 10 | atmosphere | 2.9% |

| | | |
|---|---|---|
| 11 | special nature attractions | 2.8% |
| 12 | glaciers/snow | 2.5% |
| 13 | lakes/rivers | 2.5% |
| 14 | sport opportunities | 2.4% |
| 15 | emotional ties | 2.4% |
| 16 | city experience | 2.2% |
| 17 | authentic/original | 1.7% |
| 18 | warm-hearted | 1.7% |
| 19 | cultural event | 1.4% |
| 20 | special event | 1.3% |
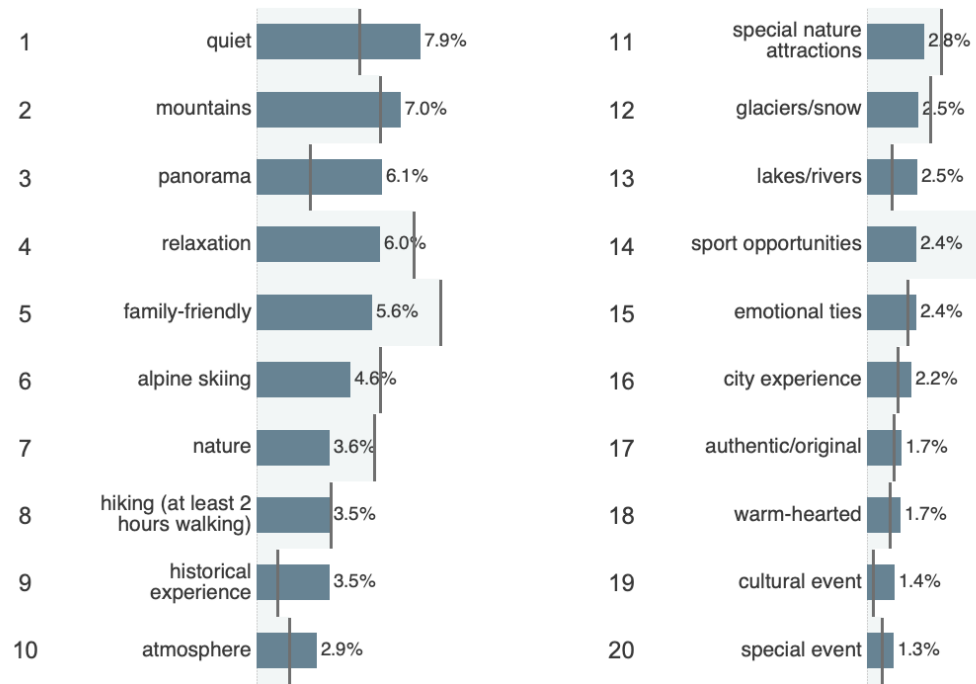
source: TMS 2017

■ = tourists from *considered* market
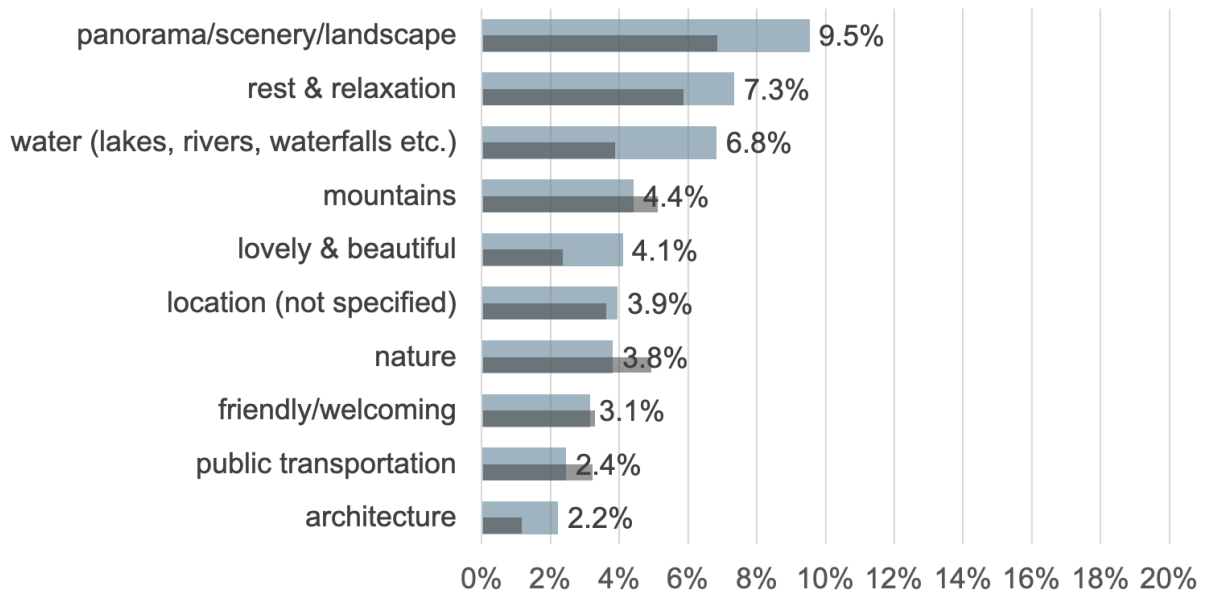| = tourists from all markets (benchmark)

## Switzerland's tourism strengths.

(leisure tourists in Swiss hotels & supplementary accommodations, open answers)

| | |
|---|---|
| panorama/scenery/landscape | 9.5% |
| rest & relaxation | 7.3% |
| water (lakes, rivers, waterfalls etc.) | 6.8% |
| mountains | 4.4% |
| lovely & beautiful | 4.1% |
| location (not specified) | 3.9% |
| nature | 3.8% |
| friendly/welcoming | 3.1% |
| public transportation | 2.4% |
| architecture | 2.2% |

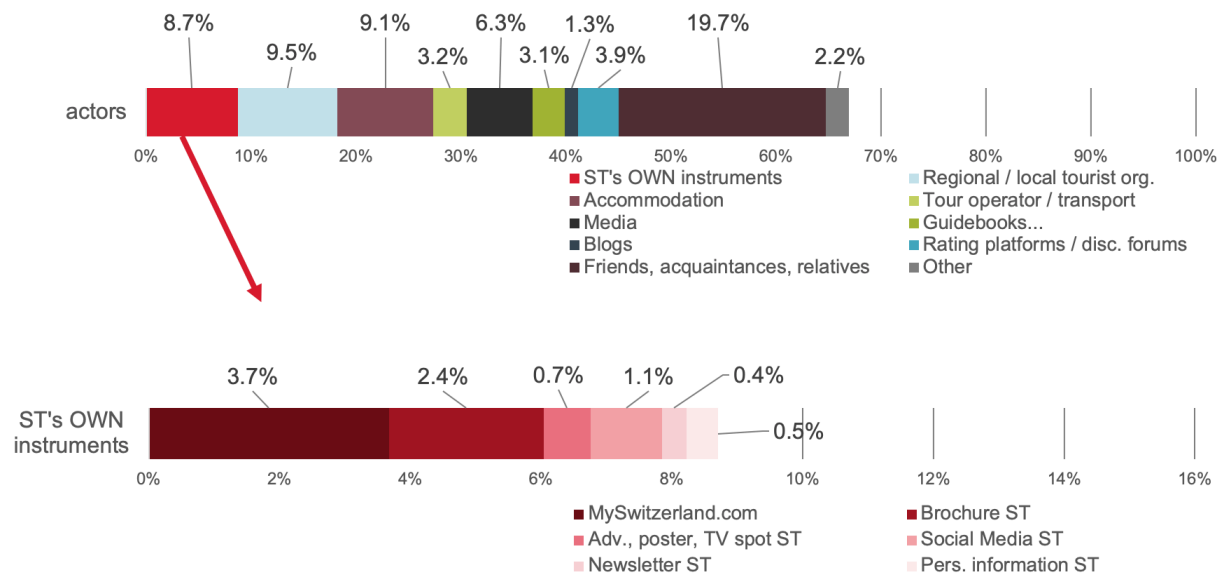0% 2% 4% 6% 8% 10% 12% 14% 16% 18% 20%

source: TMS 2017

■ = tourists from *considered* market
■ = tourists from all markets (benchmark)

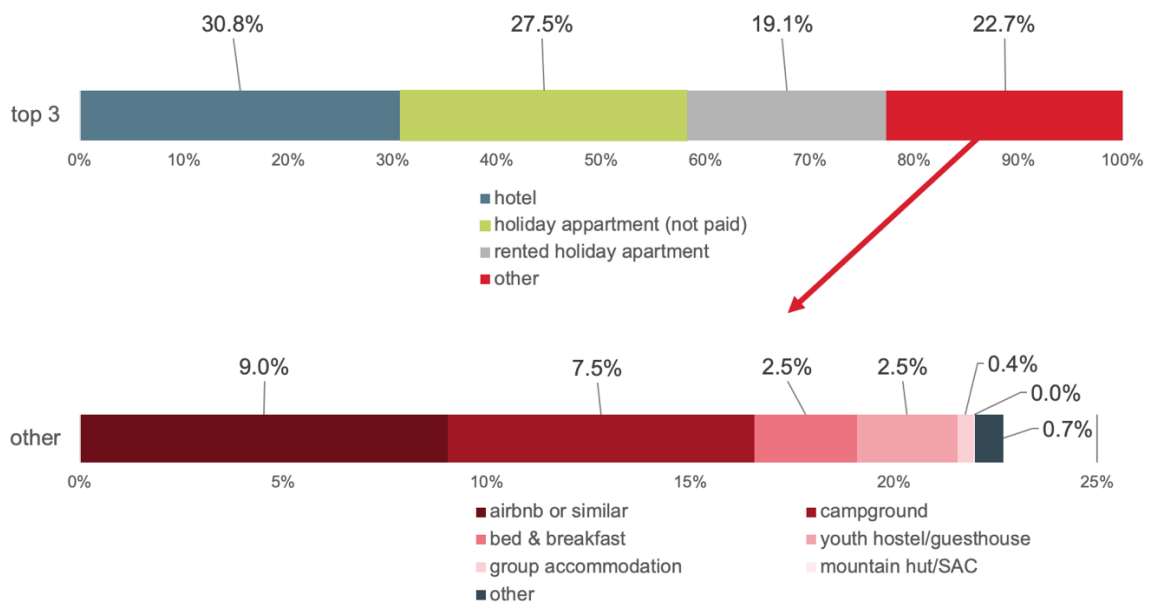# External influence of tourists in their travel decisions.
(leisure tourists in Swiss hotels & supplementary accommodations | degree of influence by sources of information)



actors

| 8.7% | 9.5% | 9.1% | 3.2% | 6.3% | 3.1% | 1.3% | 3.9% | 19.7% | 2.2% |

- ST's OWN instruments
- Regional / local tourist org.
- Accommodation
- Tour operator / transport
- Media
- Guidebooks...
- Blogs
- Rating platforms / disc. forums
- Friends, acquaintances, relatives
- Other

ST's OWN instruments

| 3.7% | 2.4% | 0.7% | 1.1% | 0.4% | 0.5% |

- MySwitzerland.com
- Brochure ST
- Adv., poster, TV spot ST
- Social Media ST
- Newsletter ST
- Pers. information ST

The *total* ST influence (including ST contributions to instruments like media, tour operator...) is **19.1%.**

source: TMS 2017

# Type of accommodation.
(leisure tourists in Swiss hotels & supplementary accommodations)



top 3

| 30.8% | 27.5% | 19.1% | 22.7% |

- hotel
- holiday appartment (not paid)
- rented holiday apartment
- other

other

| 9.0% | 7.5% | 2.5% | 2.5% | 0.4% | 0.0% | 0.7% |

- airbnb or similar
- campground
- bed & breakfast
- youth hostel/guesthouse
- group accommodation
- mountain hut/SAC
- other

source: TMS 2017

Contact.

Further sources.

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Suisse Tourisme
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localized annual planning
market forecast
Tourism Monitor Switzerland 2017

ST Market Research / Christian Huser & Janina Naef / March 2023

Appendix: affinity, share off-season, length of stay, ****/***** ON share.

## Total

|  | share off season | | length of stay | | ****/***** ON share | |
|---|---|---|---|---|---|---|
|  |  | rank |  | rank |  | rank |
|  | 2019 | 2019 | 2019 | 2019 | 2019 | 2019 |
| total | 45.3% | 19 | 1.764 | 30 | 37.8% | 24 |

## Large vs. small destinations

|  | affinity | | share off season | | length of stay | | ****/***** ON share | |
|---|---|---|---|---|---|---|---|---|
|  |  | rank |  | rank |  | rank |  | rank |
|  | 2019 | 2019 | 2019 | 2019 | 2019 | 2019 | 2019 | 2019 |
| large destinations (top 10) | 1.103 | 24 | 49.0% | 11 | 1.743 | 30 | 43.8% | 25 |
| mid-sized destinations (11-50) | 0.731 | 29 | 38.7% | 23 | 1.948 | 23 | 48.3% | 13 |
| small destinations (51-200) | 1.186 | 2 | 44.9% | 22 | 1.680 | 30 | 32.9% | 20 |
| very small destinations (201-smallest) | 0.977 | 8 | 45.2% | 16 | 1.746 | 29 | 11.7% | 21 |

## Tourism zone

|  | affinity | | share off season | | length of stay | | ****/***** ON share | |
|---|---|---|---|---|---|---|---|---|
|  |  | rank |  | rank |  | rank |  | rank |
|  | 2019 | 2019 | 2019 | 2019 | 2019 | 2019 | 2019 | 2019 |
| big cities | 1.5 | 11 | 50.6% | 16 | 1.607 | 32 | 42.7% | 28 |
| mountain | 0.676 | 23 | 34.6% | 20 | 2.162 | 23 | 34.2% | 21 |
| rural | 1.004 | 8 | 48.1% | 16 | 1.744 | 26 | 13.8% | 29 |
| small cities | 0.923 | 22 | 47.9% | 24 | 1.690 | 30 | 42.7% | 18 |

## Language zone

|  | affinity | | share off season | | length of stay | | ****/***** ON share | |
|---|---|---|---|---|---|---|---|---|
|  |  | rank |  | rank |  | rank |  | rank |
|  | 2019 | 2019 | 2019 | 2019 | 2019 | 2019 | 2019 | 2019 |
| French speaking area | 2.667 | 1 | 47.3% | 20 | 1.690 | 31 | 37.3% | 28 |
| German speaking area | 0.572 | 33 | 42.8% | 21 | 1.866 | 27 | 38.6% | 24 |
| Italian speaking area | 0.54 | 18 | 43.7% | 24 | 1.881 | 21 | 37.9% | 17 |
| Rhaeto Romanic language zone | 0.143 | 15 | 31.0% | 14 | 1.890 | 19 | 9.7% | 13 |

## Tourism region

|  | affinity | | share off season | | length of stay | | ****/***** ON share | |
|---|---|---|---|---|---|---|---|---|
|  |  | rank |  | rank |  | rank |  | rank |
|  | 2019 | 2019 | 2019 | 2019 | 2019 | 2019 | 2019 | 2019 |
| Waadt | 2.825 | 1 | 48.5% | 17 | 1.735 | 30 | 39.8% | 26 |
| Genf | 2.464 | 5 | 51.0% | 22 | 1.583 | 33 | 44.7% | 24 |
| Wallis | 1.297 | 6 | 35.3% | 22 | 2.097 | 25 | 28.2% | 25 |
| Zürich Region | 0.655 | 32 | 50.0% | 18 | 1.581 | 31 | 42.1% | 28 |
| Bern Region | 0.588 | 29 | 35.9% | 26 | 2.045 | 23 | 39.0% | 14 |
| Basel Region | 1.137 | 14 | 49.8% | 18 | 1.633 | 30 | 42.1% | 23 |
| Graubünden | 0.321 | 22 | 30.0% | 19 | 2.856 | 15 | 35.3% | 26 |
| Luzern / Vierwaldstättersee | 0.396 | 33 | 43.1% | 23 | 1.687 | 28 | 34.9% | 18 |
| Jura & Drei-Seen-Land | 2.51 | 1 | 51.3% | 14 | 1.666 | 27 | 29.5% | 24 |
| Tessin | 0.55 | 18 | 43.9% | 24 | 1.874 | 20 | 38.6% | 17 |
| Fribourg Region | 2.462 | 1 | 46.7% | 18 | 1.596 | 26 | 26.5% | 24 |
| Aargau und Solothurn Region | 0.603 | 16 | 51.5% | 18 | 1.734 | 26 | 20.3% | 22 |
| Ostschweiz | 0.34 | 18 | 46.3% | 21 | 1.636 | 31 | 30.1% | 21 |

Source: FSO/hotel statistics

*How to read these tables: see reading example on page 11.*

## Top 50 destinations

| | affinity | | share off season | | length of stay | | ****/***** ON share | |
|---|---|---|---|---|---|---|---|---|
| | | rank | | rank | | rank | | rank |
| | 2019 | 2019 | 2019 | 2019 | 2019 | 2019 | 2019 | 2019 |
| Genève | 2.393 | 8 | 52.2% | 19 | 1.648 | 33 | 45.4% | 18 |
| Lausanne | 3.007 | 1 | 53.1% | 7 | 1.729 | 30 | 40.2% | 31 |
| Zürich | 0.727 | 30 | 49.8% | 17 | 1.583 | 32 | 43.6% | 24 |
| Basel | 1.251 | 14 | 49.8% | 19 | 1.639 | 30 | 43.9% | 22 |
| Zermatt | 0.718 | 23 | 35.5% | 23 | 2.912 | 13 | 56.2% | 14 |
| Montreux | 1.767 | 5 | 44.9% | 26 | 1.800 | 24 | 68.4% | 26 |
| Le Grand-Saconnex | 3.557 | 3 | 49.3% | 16 | 1.411 | 30 | 59.0% | 13 |
| Meyrin | 1.805 | 3 | 45.5% | 29 | 1.368 | 33 | 62.6% | 25 |
| Bern | 0.888 | 25 | 44.3% | 24 | 1.660 | 25 | 41.6% | 24 |
| Crans-Montana | 2.35 | 1 | 29.4% | 15 | 3.262 | 13 | 23.7% | 24 |
| Saanen | 1.489 | 2 | 27.1% | 10 | 3.016 | 18 | 73.6% | 22 |
| St. Moritz | 0.716 | 22 | 30.6% | 17 | 4.213 | 5 | 25.0% | 32 |
| Luzern | 0.383 | 32 | 45.8% | 23 | 1.529 | 29 | 38.7% | 27 |
| Bussigny | 5.078 | 1 | 47.7% | 13 | 1.552 | 22 | 48.3% | 24 |
| Neuchâtel | 3.425 | 1 | 50.8% | 17 | 1.610 | 32 | 40.9% | 20 |
| Lugano | 0.754 | 25 | 45.6% | 21 | 1.808 | 20 | 49.0% | 15 |
| Val de Bagnes | 2.181 | 6 | 31.1% | 17 | 2.549 | 30 | 48.4% | 8 |
| Lancy | 2.721 | 3 | 51.3% | 12 | 1.525 | 30 | 0.0% | 17 |
| Opfikon | 0.505 | 30 | 45.4% | 24 | 1.338 | 29 | 56.8% | 20 |
| Grindelwald | 0.55 | 25 | 31.3% | 25 | 2.388 | 16 | 45.0% | 12 |
| Orsières | 6.636 | 1 | 21.4% | 16 | 1.380 | 6 | 0.0% | 9 |
| Fribourg | 2.642 | 2 | 50.9% | 16 | 1.635 | 24 | 66.7% | 25 |
| Crissier | 4.313 | 2 | 52.1% | 7 | 1.536 | 28 | 0.0% | 0 |
| Vevey | 2.9 | 3 | 51.7% | 18 | 1.758 | 30 | 54.2% | 20 |
| Champéry | 4.853 | 2 | 26.4% | 14 | 1.452 | 30 | 10.6% | 22 |
| Vernier | 2.21 | 6 | 49.7% | 19 | 1.505 | 33 | 33.0% | 18 |
| Martigny | 3.046 | 1 | 44.8% | 9 | 1.524 | 22 | 18.0% | 15 |
| Lauterbrunnen | 0.496 | 25 | 27.3% | 23 | 2.700 | 13 | 23.8% | 15 |
| Lavey-Morcles | 7.995 | 1 | 51.1% | 11 | 1.309 | 26 | 100.0% | 16 |
| Yverdon-les-Bains | 4.022 | 1 | 48.7% | 19 | 1.539 | 28 | 70.8% | 13 |
| Leytron | 3.37 | 1 | 46.9% | 7 | 2.056 | 20 | 0.0% | 0 |
| Morges | 3.913 | 1 | 49.1% | 18 | 1.639 | 29 | 27.7% | 16 |
| Saas-Fee | 0.681 | 16 | 37.5% | 17 | 3.338 | 22 | 35.1% | 17 |
| Chavannes-de-Bogis | 3.659 | 1 | 42.0% | 25 | 1.923 | 24 | 0.0% | 17 |
| Ollon | 2.435 | 5 | 32.3% | 17 | 2.853 | 15 | 66.4% | 22 |
| Anniviers | 1.255 | 2 | 28.3% | 15 | 2.326 | 12 | 28.7% | 13 |
| La Chaux-de-Fonds | 5.969 | 2 | 54.6% | 18 | 1.751 | 27 | 58.4% | 22 |
| Interlaken | 0.24 | 32 | 45.5% | 19 | 1.797 | 24 | 40.0% | 18 |
| Leukerbad | 0.833 | 6 | 41.9% | 10 | 1.966 | 17 | 37.6% | 18 |
| Davos | 0.203 | 25 | 32.0% | 15 | 2.517 | 24 | 64.0% | 14 |
| Saillon | 2.976 | 1 | 48.8% | 12 | 1.574 | 24 | 98.0% | 21 |
| Leysin | 0.786 | 7 | 30.8% | 19 | 1.963 | 20 | 0.0% | 17 |
| Nyon | 3.109 | 2 | 50.6% | 25 | 1.805 | 30 | 28.8% | 11 |
| Paradiso | 0.884 | 13 | 44.7% | 23 | 1.641 | 21 | 60.5% | 23 |
| Biel/Bienne | 1.651 | 3 | 48.9% | 20 | 1.633 | 27 | 57.0% | 22 |
| Carouge (GE) | 4.14 | 1 | 53.7% | 14 | 1.736 | 32 | 0.0% | 0 |
| Winterthur | 0.723 | 12 | 56.3% | 6 | 1.705 | 32 | 28.3% | 9 |
| Sion | 2.174 | 1 | 47.6% | 12 | 1.537 | 22 | 15.9% | 20 |
| Ecublens (VD) | 4.04 | 1 | 54.3% | 9 | 1.656 | 32 | 0.0% | 0 |
| Bulle | 3.261 | 1 | 43.3% | 15 | 1.446 | 17 | 0.0% | 15 |

Source: FSO/hotel statistics

*Example: In 2019, for tourists from France who visited Genève, the following further characteristics were noted:*
*- 2.39 times higher share of overnight stays than they had in the whole of Switzerland (=rank 8 out of a total of 33 markets):*
*ON-share Genève (7.73%) vs. ON-share whole Switzerland (3.23%), see tables before.*
*- the share of low season months (March-May, Sept-Nov) was 52.2% (=rank 19).*
*- the length of stay (overnight stays/arrivals in the hotel) was 1.65 nights (=rank 33).*
*- the share of 4- and 5-star hotels out of all hotel nights was 45.4% (=rank 18).*

## Summer, winter

| | affinity | | length of stay | | ****/***** ON share | |
|---|---|---|---|---|---|---|
| | | rank | | rank | | rank |
| | 2019 | 2019 | 2019 | 2019 | 2019 | 2019 |
| summer (May-Oct) | 0.901 | 22 | 1.708 | 30 | 35.4% | 22 |
| winter (Nov-April) | 1.132 | 12 | 1.829 | 28 | 40.3% | 24 |

## Summer core, winter core, off-season

| | affinity | | length of stay | | ****/***** ON share | |
|---|---|---|---|---|---|---|
| | | rank | | rank | | rank |
| | 2019 | 2019 | 2019 | 2019 | 2019 | 2019 |
| off-season I (March-May) | 1.05 | 15 | 1.770 | 29 | 38.6% | 24 |
| off-season II (Sept-Nov) | 0.952 | 18 | 1.646 | 30 | 37.7% | 23 |
| summer core months (Jun-Aug) | 0.913 | 22 | 1.745 | 31 | 34.7% | 21 |
| winter core months (Dez-Feb) | 1.124 | 12 | 1.900 | 28 | 40.7% | 23 |

## Months

| | affinity | | length of stay | | ****/***** ON share | |
|---|---|---|---|---|---|---|
| | | rank | | rank | | rank |
| | 2019 | 2019 | 2019 | 2019 | 2019 | 2019 |
| January | 1.025 | 12 | 1.878 | 30 | 41.9% | 22 |
| February | 1.191 | 8 | 2.036 | 27 | 38.9% | 23 |
| March | 1.132 | 8 | 1.948 | 27 | 40.8% | 23 |
| April | 1.063 | 14 | 1.676 | 29 | 38.7% | 21 |
| May | 0.946 | 19 | 1.662 | 30 | 35.4% | 25 |
| June | 0.838 | 26 | 1.679 | 31 | 33.8% | 24 |
| July | 0.835 | 23 | 1.716 | 31 | 34.8% | 20 |
| August | 1.055 | 12 | 1.817 | 30 | 35.3% | 20 |
| September | 0.805 | 27 | 1.650 | 30 | 36.3% | 21 |
| October | 0.923 | 16 | 1.670 | 30 | 37.1% | 24 |
| November | 1.258 | 7 | 1.617 | 31 | 40.0% | 24 |
| December | 1.149 | 13 | 1.785 | 28 | 41.7% | 23 |

Source: FSO/hotel statistics

*How to read these tables: see reading example on page 11.*