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Quest for new markets

The boom days of Swiss tourism are long over. Following a lengthy downturn, the Swiss tourist industry is seeking to secure a place on the global market – through quality, fine-tuning, and a more friendly approach.

BY ROLF RIBI

THOSE WERE THE DAYS! Around the middle of last century, Switzerland was one of the five most popular tourist destinations in the world. Whenever city-dwellers in London, Paris, Cairo and Buenos Aires felt like a break, they would come to this small country with its high mountains, famous holiday resorts and elegant hotels. For most Swiss, too, it was the done thing to holiday with the family in the Swiss countryside.

Nowadays those golden years of Swiss tourism are a distant dream. Tourist demand began to stagnate back in the 1980s. While overnight stays in hotels and holiday apartments amounted to 75 million in 1980, this number had dropped to 69 million by 2000 and to just on 65 million last year. During the same period, overnight stays in hotels fell from 34 million to the current low of 31 million last year.

Lengthly downturn

In 2003 the number of overnight stays in Switzerland fell for the third year in a row, this time by 1.4 percent (compared to a 3.8 percent drop in 2002, despite the National Exhibition). While Swiss customers remained loyal, the number of foreign visitors was down 3.5 percent (corresponding to more than one million overnight stays). The decline in important key markets was particularly worrying: ten percent fewer US visitors, 17 percent fewer visitors from Japan and 14 percent fewer from the Gulf States. Even more worrying was the 4.9 percent de-



Switzerland is becoming a target destination for the new mass tourism from China.

crease in the number of visitors from Germany, by far the most important country for our tourist industry.

In other words: Measured on the basis of overnight stays, the Swiss tourist industry has been declining, with only a few exceptions, for the past 15 years. "Ongoing slump in Swiss tourism" headlined the "Neue Zürcher Zeitung". Yet Switzerland Tourism, the marketing organisation that is 60 percent backed by the government, believes otherwise. "Swiss tourism's international position remains very strong. Our country is 17th on the list of 200 top holiday destinations, and seventh when it comes to congress tourism. Switzerland's attractiveness as a vacation destination has not suffered in the least," says Eva Brechtbühl, member of the Switzerland Tourism board.

Thomas Bieger, Professor of Tourism Economics at the University of St.Gallen, also denies the existence of a crisis in tourism. He points to the importance of day-trippers and tourists who have holiday homes here, and cites more recent attractions such as the Mystery Park in Interlaken and newly opened museums. Nevertheless, Federal Council Joseph Deiss was forced to admit to parliament this spring that "the situation in our tourism sector is serious. We are losing out not only to other competitors, but also in absolute terms – and in a growth market, too."

Global and home-grown reasons

The general decline in Swiss tourism's formerly strong international position can be attributed not only to global causes which

are difficult to influence, but also to some factors that are closer to home. As tourism became a global business, new entrants came onto the market, particularly for holidays in the South and in exotic destinations. Modern technology has significantly reduced the cost of flights and communications. Recently the economic recession of the 1990s, fear of terrorism, the Iraq war and the infectious disease SARS have discouraged visitors to Asia and the USA.

The home-grown problems lie in the structures of this important economic sector. The country boasts no fewer than 30,000 restaurants, 5,600 hotels (more than half of which have fewer than 20 rooms) and 600 alpine railways – no other branch of the economy has so many small and medium-sized enterprises (SMEs). Five hundred holiday resorts with almost as many local tourist boards reflect the federalist nature and “parish pump mentality” of this sector. Jürg Schmid of Switzerland Tourism acknowledges the need for structural change: “We will have to accept mergers to create fewer but larger hotels, and fewer railways offering a more extended service, and acknowledge that this restructuring is both practical and right.”

Upper price bracket

On an international scale, Switzerland as a holiday destination is “in the upper price bracket”, according to Jürg Schmid. The State Secretariat for Economic Affairs (seco) analysed the difference in costs between Switzerland and the European Union. Comparing Switzerland to Austria, the study came up with the following findings for 2002: 16 to 35 percent higher prices in Swiss hotels (depending on destination), 45 percent higher salaries, 42 percent more expensive food, significantly higher land prices and building costs. In short: “One week’s winter holiday in Austria is 16 to 35 percent cheaper than in Switzerland.”

Exchange rates certainly play an important role in this respect: whether or not Swiss residents go over the border to Austria to ski depends on the Euro-Swiss franc exchange rate. And whether or not Germans or Americans spend their holiday in a Swiss hotel depends on the relative strengths of the dollar, the Euro and the Swiss franc.

“The image of an expensive holiday destination has long been a millstone round our necks,” says Eva Brechtbühl of Switzerland

Tourism. Yet despite this image, ten million foreign visitors a year come to our country “because they regard Switzerland as an idyllic country”. She believes it’s just a case of demonstrating that we have got the price-benefit ratio right, and cites the “Affordable Swiss hotels” brochure published by her organisation, which gives a list of overnight and weekly rates for 120 low-cost two- to four-star hotels.

Worried hotel sector

Hotels are the main cause of concern in the Swiss tourist industry. “The hotel sector is heavily debt-encumbered, over-fragmented, and is facing increasing competition from the growing holiday home and second home market,” says Professor Hansruedi Müller of the University of Berne (see Interview on page 00). While the sector has its share of successful hotels, Christian Rey, President of the Hotelleriesuisse association of hotel owners, points to “a lack of professionalism in some areas and a relatively urgent need for structural renovations”.

“It’s official: the Swiss are friendly!” claimed a press release from Switzerland Tourism. According to a survey conducted among Swiss and foreign tourists in the summer of 2003, Swiss friendliness was rated good by Swiss holidaymakers, and very good by foreign visitors. Switzerland Tourism’s marketing campaign is aimed at promoting more hospitality: the organisation’s seal of quality denotes the “clearly de-

fined quality of services” offered by tourist operators. The new hospitality initiative, “Enjoy Switzerland”, is supported by a dozen national service providers, hotels and railways, and is being tested in four selected tourist pilot destinations (Lenzerheide, Scuol, Villars and Zermatt). The motto “Great to see you” is intended to reflect the way foreign visitors are treated from their departure airport to their arrival at the hotel.

It cannot be denied that there is a problem in this country when it comes to friendliness. Swiss hotel operators must “abandon their reserved attitude to visitors and welcome them warmly with open arms”, complains Hotelleriesuisse President Christian Rey in the “Neue Zürcher Zeitung”. A reader’s letter in the same newspaper hit the nail on the head: “Service in Austrian hotels is far friendlier than here in Switzerland. The difference between Klosters and St. Johann is like night and day.”

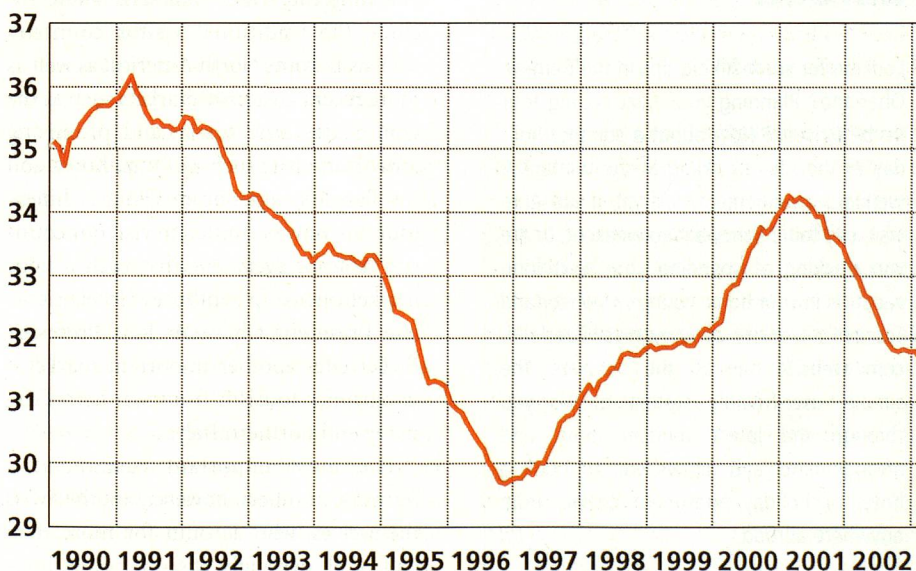
Paths to recovery

What can be done to revive the Swiss tourist industry? There are four different approaches:

- *Positioning on the international market.* “The strategy must be to offer a quality product where everything is as perfect as possible.” (Jürg Schmid). For tourism expert Müller, quality is “the only opportunity to position ourselves well”. Adds Professor Bieger, “The most important thing

Trend in overnight stays

Overnight stays in Swiss hotels in millions per year.



Source: BfS

is to offer customers convincing value, such as the Jungfrauoch for the upper price bracket and youth hostels in the lower price bracket”.

- *Reliance on innate strengths.* Nature and mountains in a largely intact landscape, a wide variety of tourist attractions in a small area, a well-connected and efficient rail network, excellent hiking trails, extensive cycling paths, gastronomic diversity, a wide range of cultural events, congresses, the very high level of safety, and “the fact that Switzerland works” (Hansruedi Müller): these are a few of the strengths of our country in terms of attractiveness to tourists. The idea behind the national marketing organisation’s slogan “Switzerland. Quite naturally” is to place the focus squarely on the landscape and on “Switzerland as a place to experience the senses and enjoy life”.
- *More cooperation, concentration and specialisation.* This need is echoed inside and outside the tourist sector, a market where small businesses predominate. “The willingness to promote cooperation is one of our key challenges,” says Professor Müller. “We must specialise more, and create more streamlined, cost-efficient affordable offerings through cooperative ventures,” explains Director Schmid. Cooperation and specialisation are what hotels need.

Holiday ideas for Swiss residents abroad

Looking for some hiking tips in the Bernese Oberland? Planning your next cycling tour in the Grisons? How about a summer holiday in the Alps or skiing in the winter? A wellness arrangement, festival or museum visit, city tour? Fancy a long weekend or are you thinking of spending your next long vacation in your home country? Switzerland Tourism’s website at www.myswitzerland.com website has all the answers. The simple, user-friendly system guides you through the latest tourism news and arrangements and allows you to book a hotel or holiday apartment online, from anywhere abroad. RR



Good food and first-class service are what tourists look for. The photo shows the Restaurant Linde in Stans (NW).

“Hotels must position themselves on the market and address specific customer groups more effectively,” claims Peter Keller of the State Secretariat for Economic Affairs.

According to Austrian expert Egon Smeral, Switzerland is “falling behind in terms of all-in packages”. Cooperation must be promoted by bringing an entire region under one umbrella, bundling tourist arrangements, and creating an all-in holiday experience.

- *Targeting the “right” markets.* These include the traditional visitor countries such as Europe, North America, as well as more recent customer markets such as the Gulf States and Russia, and promising growth markets such as India, Korea and the People’s Republic of China. Chinese tours are now permitted to visit our country. “It’s not every day that such a huge market opens up”, enthuses Hotelleriesuisse President Christian Rey. Professor Bieger cites another important market – day-tripper tourism from southern Germany and northern Italy.

The most important customers in terms of numbers, however, are the Swiss themselves, who account for more than half of all overnight stays in hotels, holi-

day apartments and camp sites. “Switzerland is an important market for us, and one we are using all our channels to canvass,” says Eva Brechtbühl of Switzerland Tourism.

New hopes

Tourist operators are now looking to the future with more optimism. While the past winter season, with 0.6 percent fewer overnight hotel stays, was scarcely something to shout about, the summer season now in swing is expected to close with a marked recovery of 2.3 percent in foreign visitor demand, albeit 0.5 percent down in terms of domestic demand. And, after an 8 percent decline between 2000 and 2003, a Basle-based economic research company is forecasting 0.6 percent growth in overnight hotel stays for the 2004 tourist year. Is there a proverbial silver lining in sight, or is it just a mirage? +

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www.swissworld.org
www.hotelleriesuisse.ch