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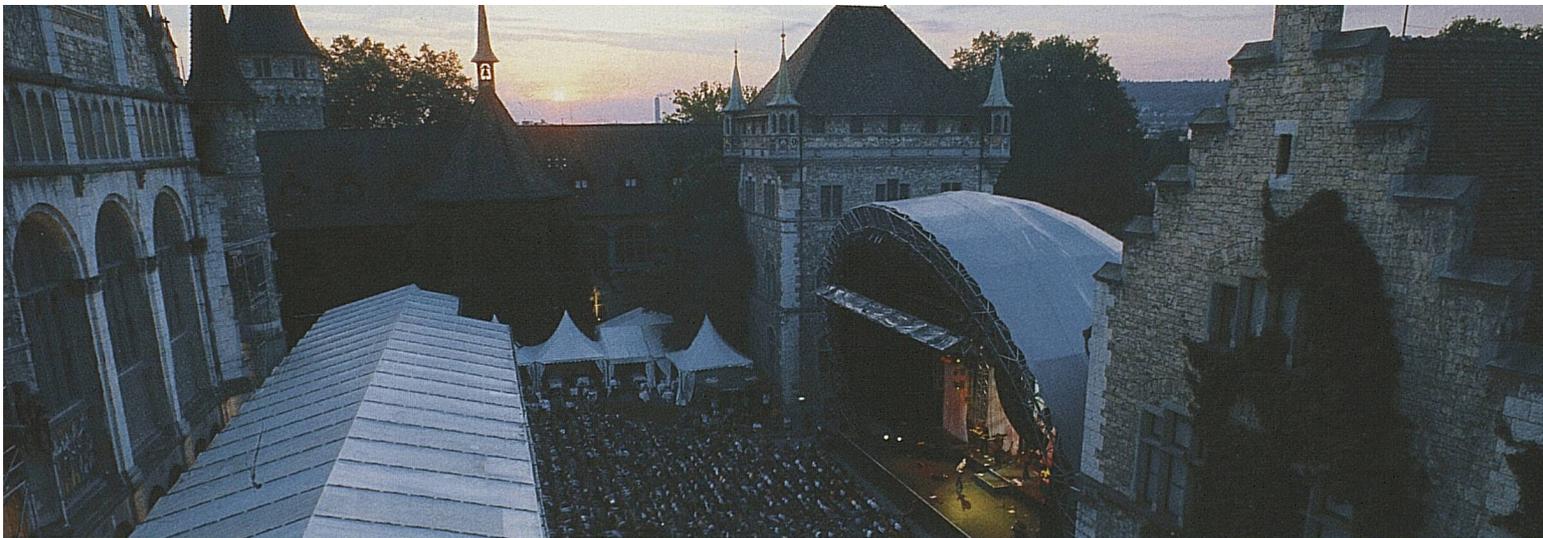
# Tourism in numbers.

## A prime challenge for Switzerland Tourism.

In a turbulent field characterized by underlying conditions that are impossible or extremely difficult to influence, effective marketing activities were what was required. Happily, marked growth in some of the emerging markets had a positive effect on the overall result.

Alphorn players on the glacier by the Jungfraujoch mountain





Zurich. The "Live at Sunset" pop festival is held in the inner courtyard of the National Museum every summer.



Rigi, Central Switzerland.

## The underlying conditions.

Many factors affect the development of visitor streams to Switzerland. Switzerland Tourism operates in an area characterized by underlying conditions that are impossible or extremely difficult to influence, yet crucial for the development of visitor numbers.

### **The crucial factor:**

#### **The course of the world economy.**

Early in 2001 it became clear that the world economy had started to slow down in the wake of the millennium euphoria, a process accelerated by the events of 9/11. The industry repeatedly placed its trust in the assurances given by forecasters that the economy would soon turn around. Private consumers also believed these promises and their continuing propensity to spend shored up the economy for a long time. Although the light at the end of the tunnel is still in sight, the end of the tunnel itself is forever being moved forward.

#### **The strong Swiss franc.**

Apart from a sluggish economy, which is obviously impacting other tourism destinations as well, unlike its competitors, Switzerland also has to shoulder the burden of a strong Swiss franc. Whilst the exchange rate against the euro stabilized last year, it is still too low. As a result, visiting Switzerland has become roughly 15% more expensive for Europeans over the last three years, simply because of the way the exchange rate has developed.

When customer confidence is low, people pay even more attention to price. This explains why Switzerland has to position itself via quality, which justifies a higher price. By focusing on first-class quality, the Swiss tourism industry is strengthening its long-term position in the face of ever tougher competition.

#### **The geopolitical situation.**

The world observed the events in the Middle East with uncertainty. Insecurity and doubt as to the outcome of the conflict paralyzed the world economy. People held back, planning their vacations as late as possible. The need for security is gaining in importance when it comes to deciding where to go on vacation. Switzerland has a reputation for being a safe and stable country, as do its Alpine neighbors. In contrast to these countries, however, the number of visitors traveling to Switzerland by air from overseas is proportionally higher. Precisely these markets reacted very sensitively to developments. Switzerland has felt the effects of this particularly strongly.

#### **The weather.**

Besides these man-made factors there is another factor that significantly affects the course of a tourism season: the weather. The summer of 2002, which was hit by rain for long periods, was one reason why the numbers for July and August were not better. On the other hand, early snowfalls at higher altitudes in December at least helped the winter sport areas achieve satisfactory results.



## 2002 Indicators.

Expressed as a percentage of total expenditure, operating costs continued to fall, allowing more funds to be plowed into marketing activities. Marketing costs, including attributable staff costs, stabilized at a high level when measured against total expenditure. The level of self-financing with respect to total expenditure fell slightly due to the special funds received. With respect to membership, we recorded a further net increase of 57 members. We also registered great interest among strategic business partners, expressing itself in additional funds. This is a pleasing development.

Staff costs expressed as a percentage of total expenditure continued to fall, and when measured against a heavily staff-oriented, one-to-one marketing approach in the key account area, remain on an ambitious, healthy level. In the fiscal year just ended we focused our marketing activities on media work, with the number of exposures generated climbing a further 24.9% above the previous year.

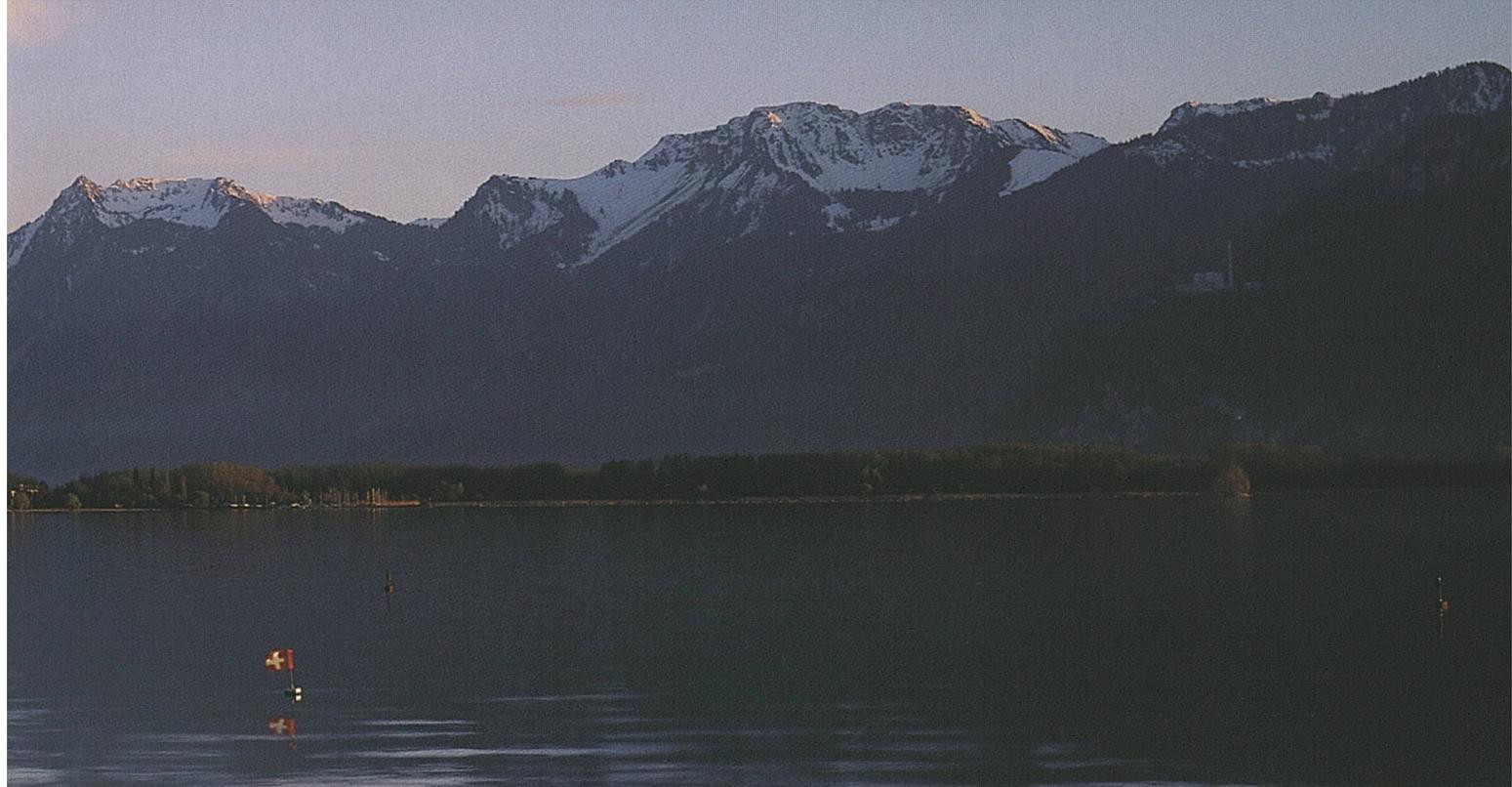
The adoption of additional business plans with tour operators and first-class booking offerings of tourism partners put the brake on the general decline in overnights, without being able to prevent it entirely. Despite the difficult economic and geopolitical situation, this allowed us to

achieve targets that had been lowered in comparison with the previous year. As a result of additional marketing campaigns and an increase in the efficiency of our marketing instruments, the tourism revenue generated by each Swiss franc spent on marketing (marketing leverage), at CHF 20.10, dipped only slightly compared to the previous year.

Overall, fewer overnights meant that the tourism revenues influenced by Switzerland Tourism could not be maintained at the previous year's levels. All in all, though, we can say that Switzerland Tourism has become even more efficient and productive in its deployment of funds.

Switzerland Tourism indicators	2001	2002
Directly influenced overnights	3 962 000	3 540 000
Contacts worldwide	4 371 000 000	5 458 000 000
Marketing leverage CHF	21.47	20.10
Tourism revenues in CHF	911 260 000	814 200 000
Marketing costs as a percentage of total expenditure (including staff costs)	85.29 %	85.12 %
Level of self-financing	45 %	41 % <sup>1)</sup>
Staff costs as a percentage of total expenditure	28.62 %	27.93 %
Members	540	597

<sup>1)</sup> The reduction in the level of self-financing can be attributed to a nonlinear division of the annual installments of Federal funds. The additional payment from the government for assuming some of the marketing activities of the former Swissair had a corresponding effect.



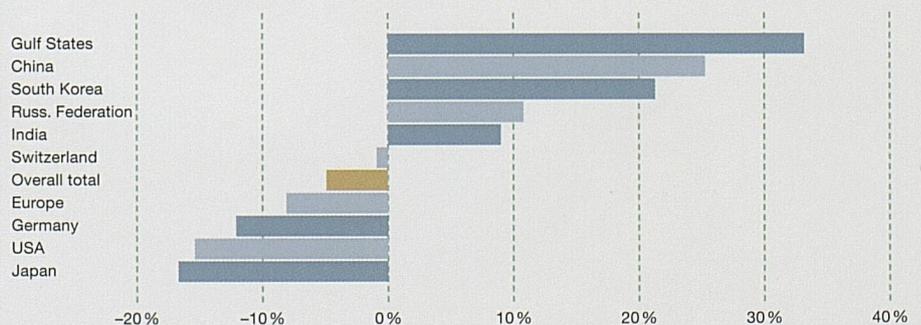
Evening ambience on Lake Geneva, Canton Vaud. Chillon Castle with the Dents du Midi mountains (3257 m/10 686 ft) in the background.

# 2002 and the development of overnights.

2002 was another difficult year for Switzerland Tourism. Overall, the number of overnights recorded by hotel and spa establishments dropped by 4.9 % to an approximate total of 33 million. However, the decline from some established markets was partially made good by marked increases from the emerging markets. In addition, Swiss holidaymakers remained loyal to their country for the most part.

The weak economy and the strong Swiss franc had a clear impact on the results for Europe, which were down 7.9 % compared with the previous year. However, not all the European markets developed in the same way. With respect to the higher volume markets the percentage change in the number of overnights recorded compared with 2001 ranged from -15 % for Sweden to +11 % for Russia, which has witnessed a doubling of the number of overnights since 1999. Europe as a whole will not return to the path of growth, though, until the number of visitors from Germany starts to rise again, since at 43 % our northern neighbors hold by far the biggest market share of all European overnights. It is therefore to be hoped that the long awaited economic upturn will finally happen.

## Changing overnight rates in hotel and spa establishments in selected markets in 2002 compared to 2001.



Source: FSO 2003

Several Asian markets continue to exhibit strong growth. The volume of overnights from the Gulf States, for example, has doubled since 1999, and at the end of 2002 was on a par with that generated by markets such as Spain and Austria. China and India also remain on a clear path to growth. Unfortunately, Japan sustained a further decline, although this would appear to have bottomed out since the number of visitors from the Land of The Rising Sun has been

climbing again since fall 2002. Overall, Asia ended the year slightly down by 1.7 %. If we exclude Japan, however, the Asian market grew by a healthy 8 %.