

Press Release

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KOF Forecasts for Swiss Tourism: Upward Pointing Trend

The winter season was a difficult one for Swiss tourism. At an estimated plus 0.6%, the number of overnight stays grew very slowly. In contrast, the outlook for the summer season is more favourable, with the volume of foreign guests, especially from so-called long-distance markets such as China and the USA, expected to follow a positive trend. As a result, the number of overnight stays is set to rise by an estimated 1.7% in the summer season. The tourism trend in the coming two years is pointing up; even the Alpine region is expected to recover.

2016/2017 winter season: tourism faced major challenges

Due to unfavourable weather conditions, the winter season posed major challenges to the Swiss tourism industry. According to KOF estimates, the number of overnight stays had gone up 0.6% from the previous year's season. At plus 0.5%, demand among domestic visitors followed a positive trend while foreign demand, at plus 0.6%, embarked on a moderate recovery following the significant decline in the previous year. Demand among European visitors actually declined. In contrast, long-distance markets recorded substantial growth. Thanks to an increase in the number of overnight stays by domestic guests, the total number of overnight stays picked up slightly in the Alpine region. As before, the cities reported the most dynamic trend.

Forecast for the 2017 summer season: growth driven by foreign visitors

Thanks to visitors from abroad, the summer season is expected to follow a more positive trend than in the previous year. The decline in the number of Eurozone visitors should have bottomed out and the anticipated economic recovery in the Eurozone is likely to translate into an increase in visitors from this region. The total expected rise in the number of overnight stays by foreign visitors is 2.1%. Last year's positive development in domestic overnight stays is likely to continue in the coming summer season. The volume is expected to rise by 1%. Since more European visitors are travelling to Switzerland again, the number of overnight stays in the Alpine region is set to rise. City destinations continue to follow a dynamic trend in terms of overnight stays.

Brighter outlook for tourism

Given solid domestic demand and the recovery of foreign demand, the development in overnight stays is pointing up over the coming two years. Domestic demand is set to remain on a positive path and foreign demand will recover significantly. The Alpine region will digest the setbacks of the past few years and urban regions will continue to grow. Thanks to the recovery of foreign demand and the consistent strength of domestic demand, total demand is expected to rise this year. At the same time, income is likely to increase due to the stable exchange rate situation and the gradual improvement in real competitiveness. Even so, the competitive situation does not allow for a significant rise in prices.

Special analysis: structural analysis of non-hotel accommodation

Aside from classic hotels, so-called non-hotel accommodation (commercially run holiday apartments, collective lodgings and camp sites), which accounts for 44% of all beds and 30% of all overnight stays nationwide, also plays an important role in Swiss tourism. Non-hotel accommodation is particularly important in the Alpine region. Demand is mostly of a domestic nature. Airbnb is a type of accommodation that has grown significantly in the last few years and is likely to expand further in the future. This form of lodging is particularly popular in cities and in regions with large numbers of holiday apartments. The platform provides hosts with growing opportunities to offer non-hotel accommodation to foreign tourists. This will, however, increase competitive pressure on classic hotel businesses.

The full report on forecasts for Swiss tourism in German or French is available here:

<http://www.kof.ethz.ch/en/news-and-events/media/press-releases.html> →

The KOF tourism forecasts are prepared on behalf of the State Secretariat for Economic Affairs (SECO). SECO is in a position to finance tourism forecasts via the Swiss Federal Act on the promotion of innovation, cooperation and the expansion of expertise in the tourism sector (Innotour). The primary addressees of the tourism forecasts are the tourist sector and the cantons.

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