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**TOURISM IN SWITZERLAND**

Developments and challenges

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# STRUCTURE

- **Statistics**
- **Policy governance**
- **Swiss tourism policy**
- **New markets**
- **Conclusions**







# BASIC STATISTICS

- **4.1% of total employment (145,000)**
- **2.9% of GDP**
- **36.2 mil overnight stays**
- **4,967 hotels and hostels**
- **Origin markets: Germany, Britain, France, US and Italy (56% of arrivals)**

**EXPORT REVENUE**

Industry <sup>2</sup>	2011	2010	2009	2008	2007
	in billion CHF				
1. Chemical industry	74.6	75.9	71.8	71.9	68.8
2. Metal and machine industry	64.0	63.6	58.1	74.0	72.5
3. Watchmaking industry	19.3	16.2	13.2	17.0	16.0
4. Tourism (Tourism Balance of Payments)	15.6	15.6	15.4	15.6	14.6
5. Textile industry	3.2	3.4	3.7	4.5	4.6

# Travel receipts and expenditure in millions \$ 2010

Country	Travel receipts	Travel expenditure	Balance
Austria	18,645	10,221	8,425
Belgium	10,235	18,679	-8,444
France	46,514	38,493	8,021
Netherlands	12,983	19,611	-6,627
Switzerland	14,967	11,149	3,818

# CHARACTERISTICS

- **Tourism is a fragmented services industry**
- **Services are provided in general by micro, small and medium sized suppliers**
- **Aviation is an exception**
- **Technology replaced may repetitive jobs: airport check-in, hotel check-out**
- **“Aesthetic labour” – emotional relations with clients**



# UNFORESEEN EVENTS

- **Bird or swine flu**
- **Icelandic volcanic ash cloud**
- **Flood of refugees**

# **GOOD GOVERNANCE**

- **Accountability**
- **Transparency**
- **Efficiency**
- **Responsiveness**
- **Forward-looking vision**
- **Rule of law**

# **POLICY MANAGEMENT**

- **Management of tourism is complex**
- **Cooperation at the central level**
- **Interests may be conflicting**

# MINISTRIES CONCERNED

- **Tourism**
- **Transport**
- **Security and borders (visas)**
- **Taxation**
- **Health (hygiene, liquor licensing)**
- **Environment**
- **Labour issues**
- **Agriculture**



# GOVERNANCE

- **Cantons have autonomous tourism policy**
- **Federal government created:**
  - **Swiss Tourism (to promote CH as an unique tourist destination with a high concentration of attractions)**
  - **Swiss Society for Hotel Credit (to promote the accommodation business)**

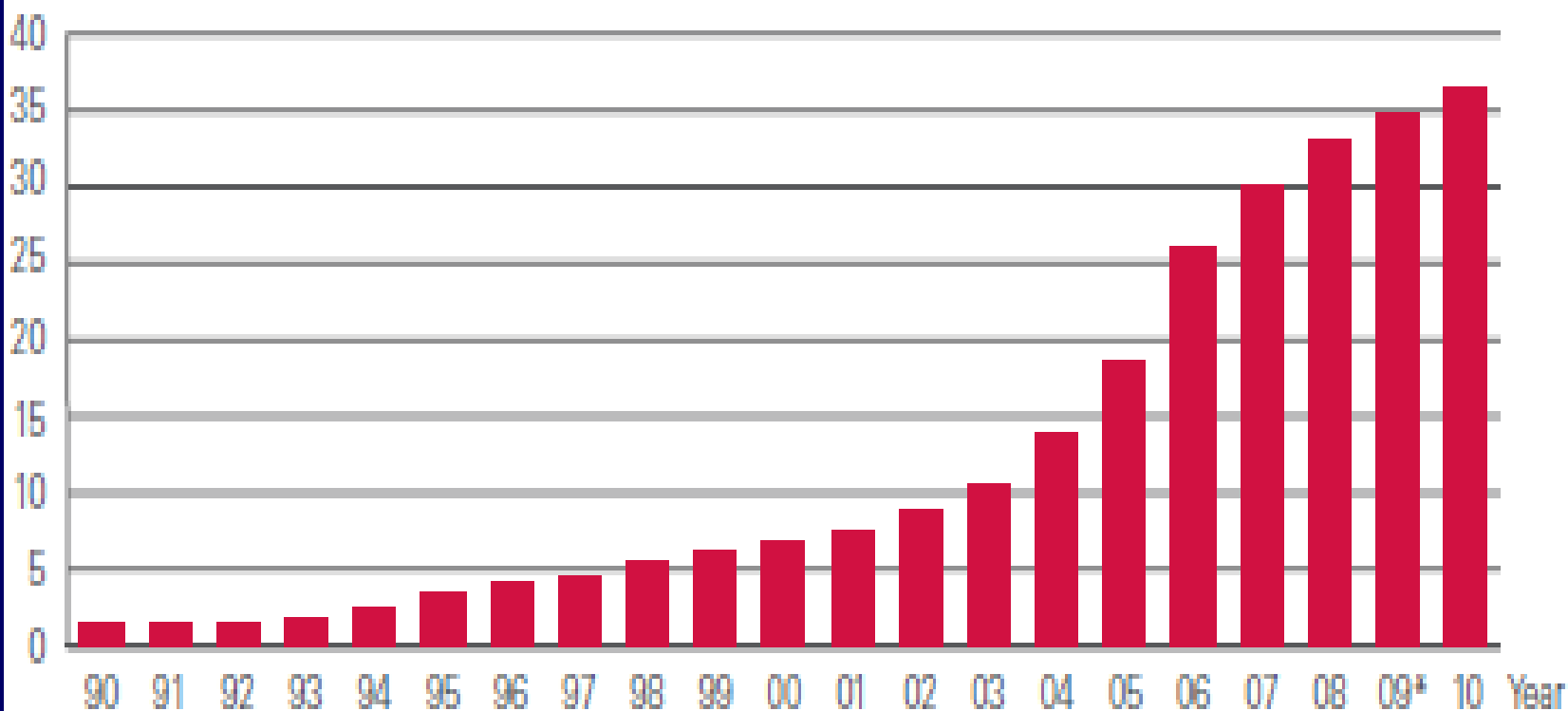


# SWISS TOURISM POLICY

- **Strategic management:** climate change and conflicts with tourism
- **Inter-disciplinary approach:** how various policies affect tourism, to improve consistency and cooperation among agriculture, climate, environment and infrastructure
- **CH as the destination:** attraction of tourists from old and new markets

# PERCENTAGE OF SKI AREA WITH MAN-MADE SNOW COMPARED TO OVERALL PREPARED SKI AREA IN SWITZERLAND

in % Austria: 66 % (2009/10), Italy: 70 % (2007/08), France: 21 % (2009/10), \*Estimated values





# SWISS TOURISM POLICY

- **Competitiveness: Innovation in CH**
  - The government created *InnoTour* in 1997 to trigger and improve innovation by SMEs (new business opportunities)
  - Objective to enhance competitiveness at destinations
  - Cooperation and sharing of knowledge
  - Improvement in education, training and *retention* of skilled personnel (cooks)
  - Migrants may be a partial solution to the labour shortage, but they do not contribute to the skills shortage (8% in CH)

# NEW SOURCE MARKETS

- **China** (50% annual increase)
- **Russia** (10% annual increase)
- **India** (17% annual increase)
- **Korea** (24% annual increase)





# Jungfraujoch 3,454 m

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Center  
Skischule  
Albstadt

BMW  
Sport

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# HEALTHCARE TOURISM

- **Ageing clients request special and flexible services (they have time and resources)**
- **Anti-ageing treatment**
- **Changing lifestyles (request for special custom made high quality services)**
- **Communication technologies**
- **Chinese: privacy, no judgement by people who know them**

# CONCLUSIONS

- **Create employment**
- **Attract FDI**
- **Earn foreign currency**
- **New markets in Asia**
- **Tourism has fluid boundaries between the formal and informal economy**

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# WELCOME TO SWITZERLAND



