# Market and Trade Profile: Switzerland

Switzerland

# Overview

- **Chapter 1: Inbound market statistics** provides insights on key statistics about Swiss travellers and who they are. It takes a look at Britain and its competitive set as well as activities of Swiss visitors in the UK.
- **Chapter 2: Understanding the market** takes a close look at Swiss consumer trends, booking, planning and further travel behaviour of this source market.
- **Chapter 3: Access and travel trade** shows how the Swiss travel to the UK, how to best cater for their needs and wants during their stay and gives insights into the Swiss travel trade. Further ways of working with VisitBritain and other useful research resources are pointed out.

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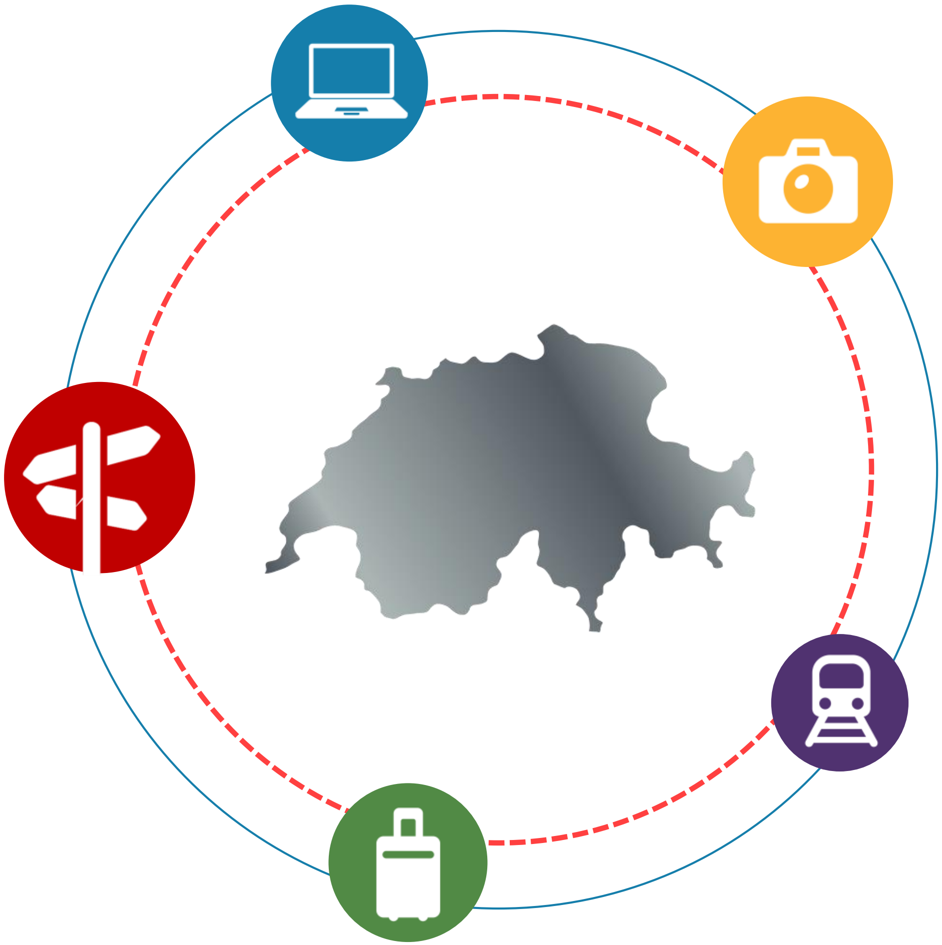


# Chapter 1:
# Inbound market statistics

# Chapter 1: Inbound market statistics

## Chapter summary

- The Swiss outbound market is forecasted to account for 26.5 million trips abroad with at least one overnight stay by 2020. The UK was the 6th most popular destination behind France, Italy, Germany, Spain and Austria for such trips in 2016.
- The Swiss rank globally in 21st place for international tourism expenditure with more than US$16.0bn.
- Switzerland was the 11th largest inbound source market for visits to the UK and 8th for spend in 2016.
- Most visits from Switzerland to the UK are made between April and September.
- 93% of departing Swiss visitors are either ‘Very’ or ‘Extremely’ likely to recommend Britain for a holiday or short-break.

**2016: £792m spend by the Swiss visiting the UK**

*Source: International Passenger Survey by ONS, Oxford Economics, UNWTO, CAA 2016 (asked to leisure visitors)*

# Chapter 1.1: Key statistics

## Key insights

- Switzerland is Britain's 11th largest source market in terms of visits and 8th most valuable for visitor spending (2016).
- 48% of spending came courtesy of business visits, 29% from holiday visits and 13% from visits to friends and/or relatives in 2016.
- The number of business trips has grown to 242,000 visits in 2016, just short of the record of 247,000 set in 2006.
- London is the leading destination for a trip to Britain but South East, South West and Scotland are also popular (based on 2014-2016 average nights).
- The most popular activities undertaken by Swiss travellers in Britain include shopping, going to the pub, visiting parks and gardens, visiting museums and art galleries as well as castles and historic houses (2011, 2016).
- Swiss visitors were less likely than the global average to buy their trip as part of a package or all-inclusive tour.*

**The UK was 6th most popular destination for Swiss outbound travel (2016)**

**Please note definition of package or all inclusive tours on p.16.*
*Source: International Passenger Survey by ONS, Oxford Economics (overnight trips)*

# 1.1 Key statistics: global context and 10 year trend

## Global context

| Measure | 2016 |
|---|---|
| International tourism expenditure (US$bn) | 16.0 |
| Global rank for international tourism expenditure | 21 |
| Number of outbound overnight visits (m) | 22.2 |
| Most visited destination | France |

## Inbound travel to Britain overview

| Measure | Visits (000s) | Nights (000s) | Spend (£m) |
|---|---|---|---|
| **10 year trend** | | | |
| 2007 | 738 | 3,789 | 350 |
| 2008 | 702 | 3,376 | 322 |
| 2009 | 701 | 3,941 | 382 |
| 2010 | 623 | 3,686 | 367 |
| 2011 | 768 | 4,318 | 414 |
| 2012 | 832 | 4,094 | 547 |
| 2013 | 807 | 4,026 | 498 |
| 2014 | 864 | 4,176 | 488 |
| 2015 | 872 | 4,478 | 516 |
| 2016 | 940 | 5,009 | 792 |
| **Share of UK total in 2016** | 2.5% | 1.8% | 3.5% |

*Source: International Passenger Survey by ONS, UNWTO, Oxford Economics*

# 1.1 Key statistics – volume and value

## Inbound volume and value

| Measure | 2016 | Rank out of UK top markets |
|---|---|---|
| Visits (000s) | 940 | 11 |
| Nights (000s) | 5,009 | 14 |
| Spend (£m) | 792 | 8 |

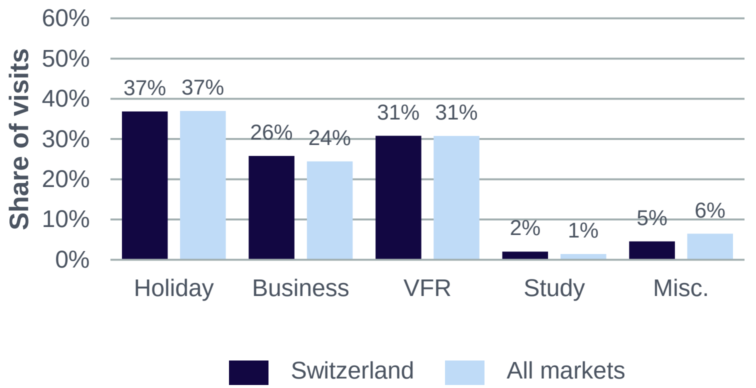
## Nights per visit, spend

| Averages by journey purpose in 2016 | Nights per visit | Spend per night | Spend per visit |
|---|---|---|---|
| Holiday | 6 | £115 | £668 |
| Business | 2 | £647 | £1,559 |
| Visiting friends/ relatives | 5 | £69 | £364 |
| All visits | 5 | £158 | £843 |

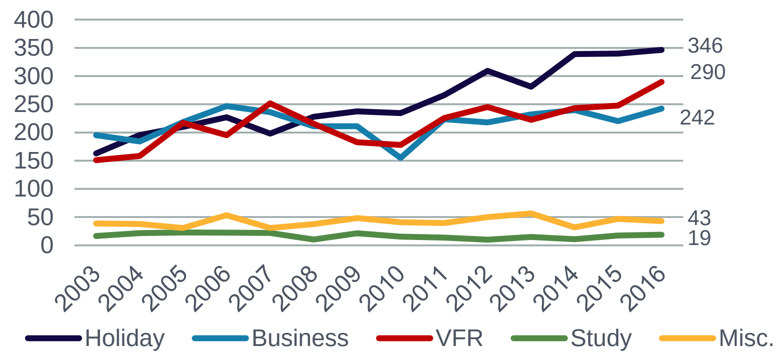
*Source: International Passenger Survey by ONS*

# 1.1 Key statistics: journey purpose

## Journey purpose 2016




## Journey purpose trend (visits 000s)



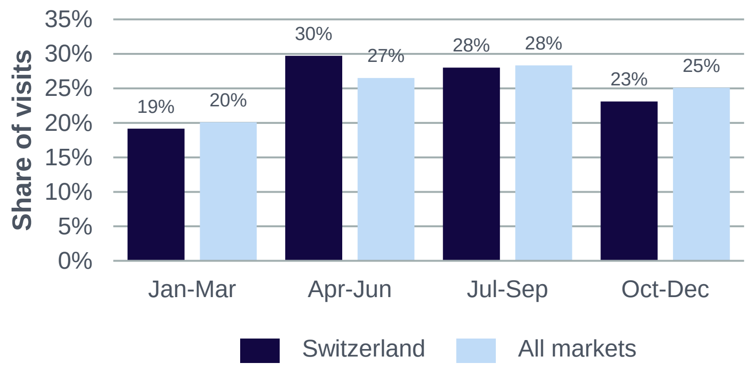

- 37% of all visits to the UK from Switzerland were made for holiday purposes, followed by 31% of visits made to visit friends and/or relatives in 2016.
- 77% of holiday visits from Switzerland to the UK in 2015 (excl. UK nationals) were made by repeat visitors. These repeat visitors came on average between three and four times (a high visit frequency compared to other markets) and spent on average £2,469 in the UK in the past ten years.

- Holiday and VFR visits continue to lead in terms of volume of visits from the Swiss market. In 2016, 48% of spending came courtesy of business visits, 29% from holiday visits and 13% from visits to friends and/or relatives.
- The number of business trips has grown to 242,000 visits in 2016, just short of the record of 247,000 set in 2006.
- 95% of those coming to the UK for business visits (excl. expats) had been to the UK before followed by those coming to visit friends or relatives who live in the UK (91%).

*Source: International Passenger Survey by ONS; repeat / first time visitors question asked in 2015*

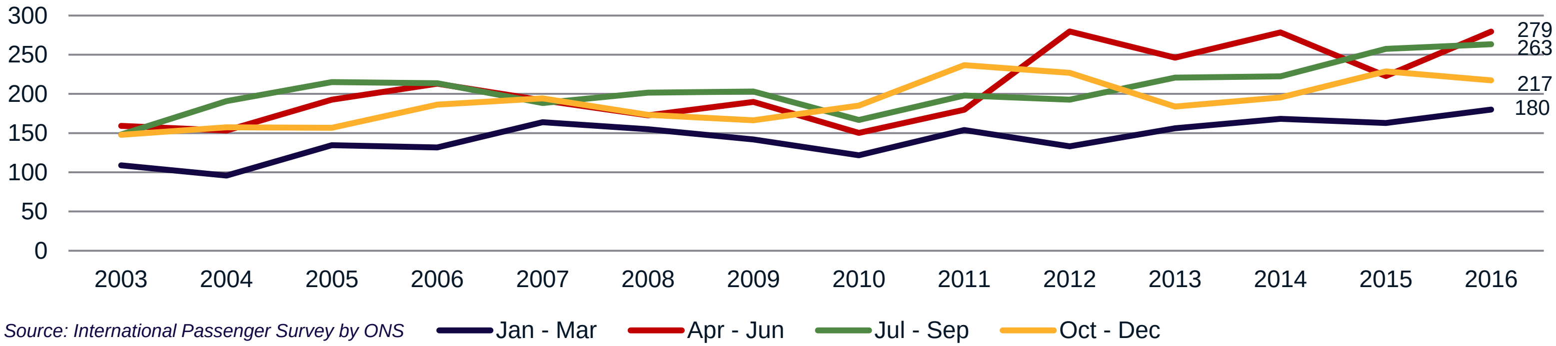
# 1.1 Key statistics: seasonality

## Seasonality 2016




- In 2016, 30% of visits from Switzerland to the UK were made in the second quarter followed by 28% in the summer quarter. 23% of visits came in the last quarter of the year followed by 19% from Jan-Mar.
- The volume of visits in the summer quarter has grown in recent years. Visits in the spring quarter have fluctuated recently but have gained momentum again in 2016 when they closed just short of the 2012 record which was set at 280,000 visits. Visits in the first quarter have peaked at a record of 180,000 visits in 2016.

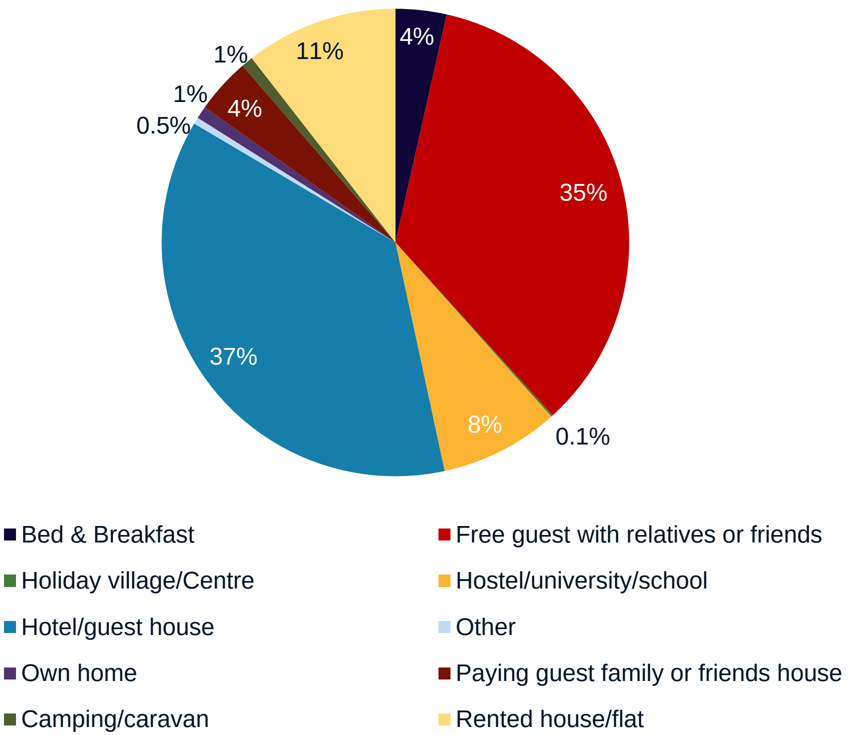
## Seasonality trend (visits 000s)




*Source: International Passenger Survey by ONS*

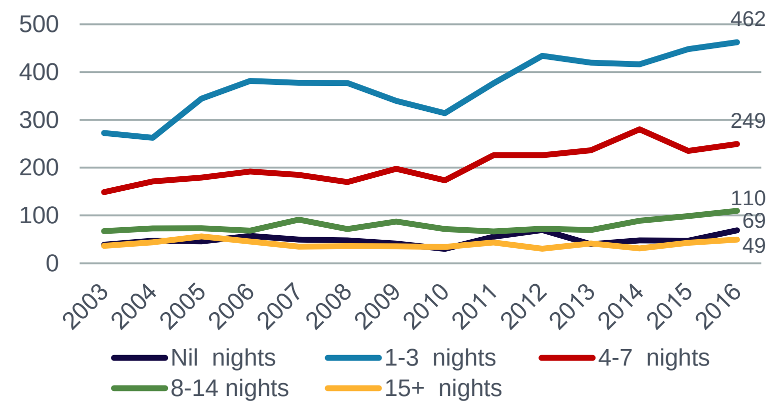
# 1.1 Key statistics: length of stay and accommodation

## Accommodation stayed in, 2016 (nights, %share)




*Source: International Passenger Survey by ONS*

## Duration of stay trend (visits 000s)




- Short trips of 1-3 nights and 4-7 nights are the most popular duration of stay amongst Swiss visitors.
- Two forms of accommodation dominate the picture with 37% of nights spent at a 'hotel/guest house', closely followed by 35% of nights spent staying for free with relatives or friends. 11% of nights were in 'rented houses or flats' in 2016.

# 1.1 Key statistics: regional spread

## Visits to the UK (2014-2016 average)

| Region | Nights stayed (000) | Visits (000) |
|---|---|---|
| Total | 4,556 | 892 |
| Scotland (SC) | 340 | 51 |
| Wales (WA) | 77 | 16 |
| Northern Ireland (NI) | 26 | 5 |
| London (LDN) | 2,109 | 511 |
| North East (NE) | 75 | 8 |
| North West (NW) | 283 | 56 |
| Yorkshire (YO) | 88 | 17 |
| West Midlands (WM) | 205 | 30 |
| East Midlands (EM) | 72 | 17 |
| East of England (EoE) | 184 | 39 |
| South West (SW) | 504 | 71 |
| South East (SE) | 575 | 113 |
| Nil nights (Nil) | N/A | 55 |

*Source: International Passenger Survey by ONS*

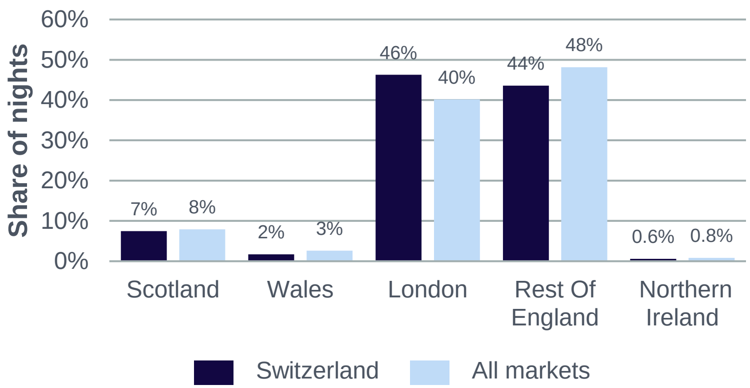
## Nights (% share) (2014-2016)

# 1.1 Key statistics: regional spread and top towns and cities

## Top towns and cities visited

| Town | Visits (000s, 2014-2016 average) |
|---|---|
| London | 511 |
| Edinburgh | 35 |
| Manchester | 22 |
| Bristol | 19 |
| Brighton/Hove | 16 |

## Regional spread (2014-2016)

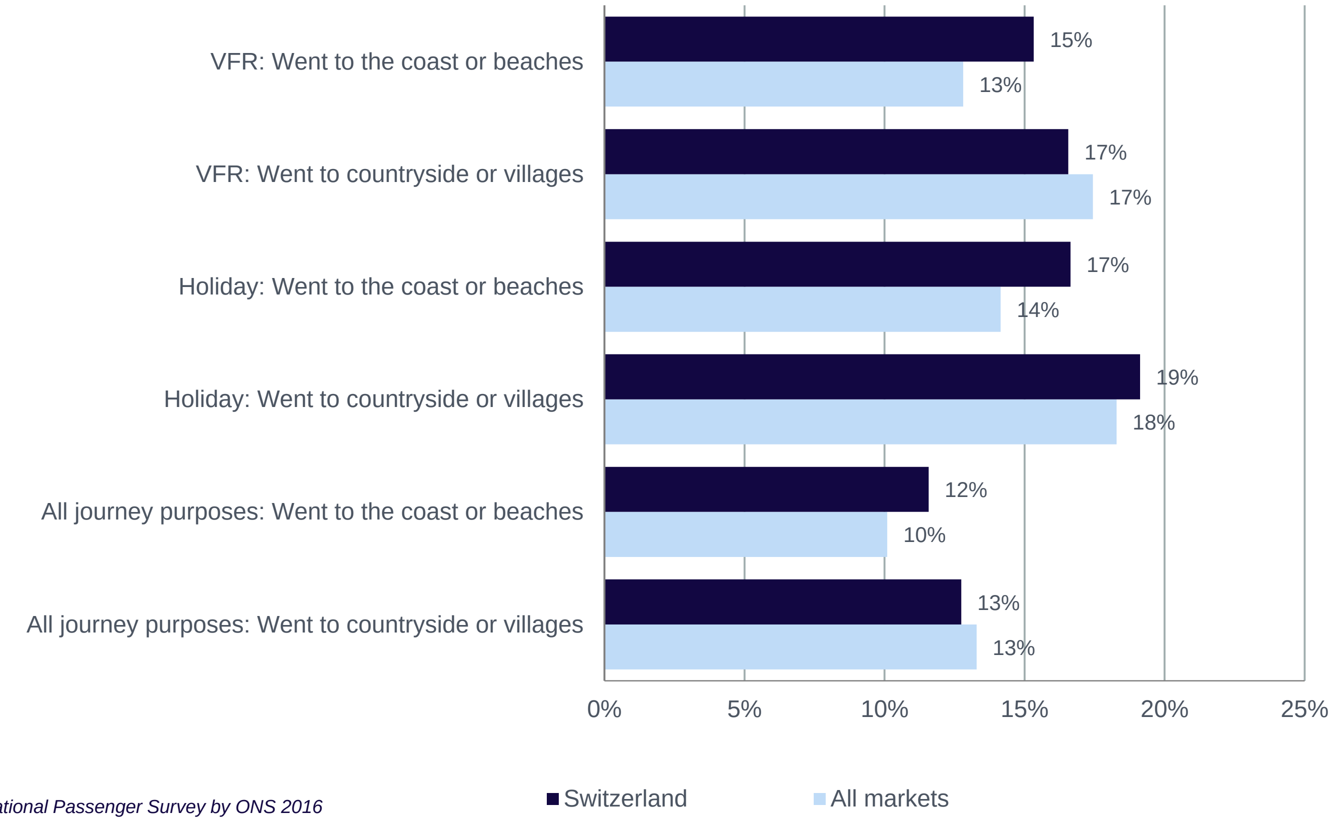



*Source: International Passenger Survey by ONS*

- London is the leading destination for a trip to Britain, accounting for 46% of visitor nights, but the South East, the South West and Scotland are also popular (based on the average nights spent in the UK beetween 2014 and 2016).
- Swiss visits have a slightly above average propensity to feature coastal areas of Britain. Holiday visits are most likely to feature this activity and are also the most likely journey purpose to feature the countryside or villages.
- Fewer visits from Switzerland than the all market average were bought as part of a package or an all-inclusive tour in 2016.
- Swiss visitors tend to be comfortable with taking public transport showing above-average use of those modes of transport in 2013. More than 2 in 5 Swiss visits took a taxi during their trip.

# 1.1 Key statistics: visits to coast, countryside and villages

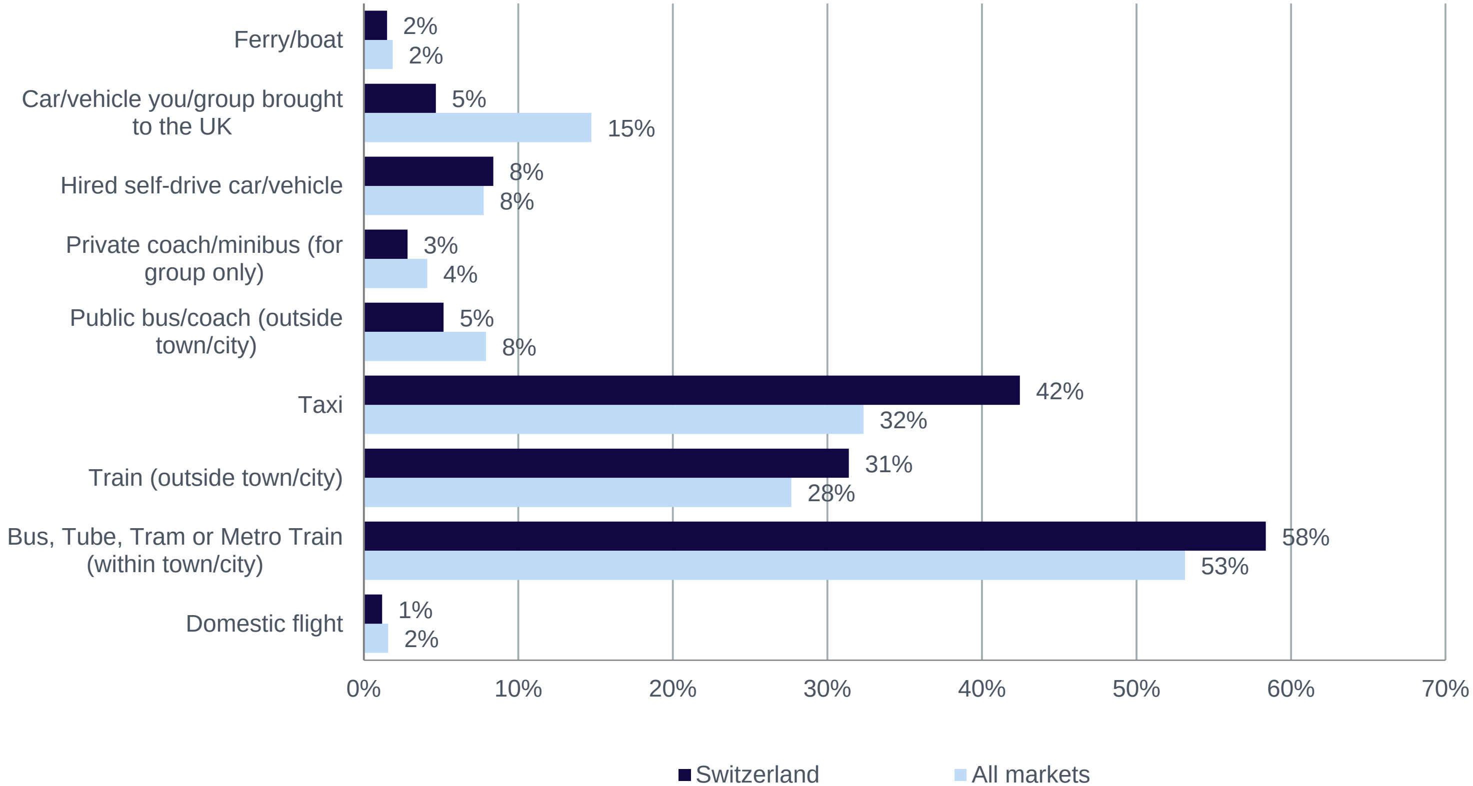
## Propensity to visit coast, countryside and villages




*Source: International Passenger Survey by ONS 2016*

# 1.1 Key statistics: use of internal modes of transport

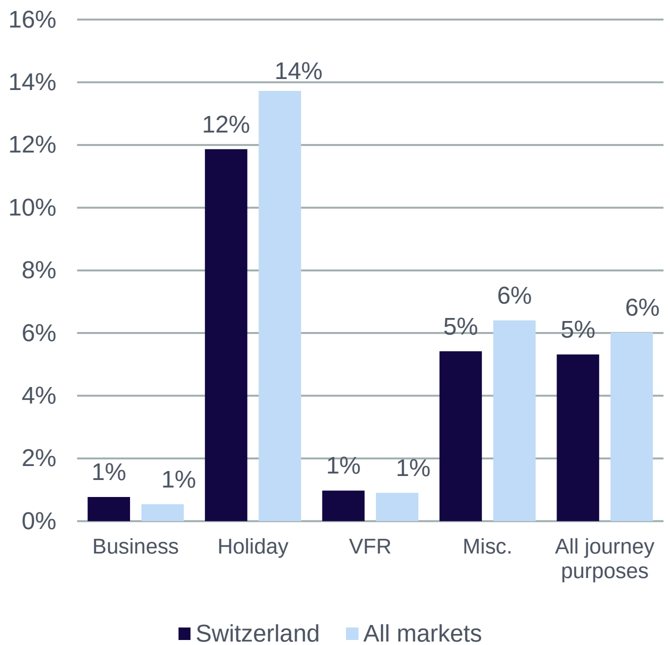
## Propensity to use internal modes of transport




*Source: International Passenger Survey by ONS, 2013*

# 1.1 Key statistics: purchase of transport and package tours

## Proportion of visits that are bought as part of a package or all inclusive tour in 2016




*International Passenger Survey by ONS*

*To be defined as a package, a trip must be sold at an inclusive price covering both fares to and from the UK and the cost of at least some accommodation. While some respondents may not know the separate costs of their fares and their hotel because they bought several air tickets and several sets of hotel accommodation from their travel agent, the ONS definition of a package is that the costs cannot be separated.*

# 1.2 Visitor demographics

## Visitor characteristics

- Business visitors are almost twice as likely to be male than female.
- More than 3 out of 4 holiday visitors (excl. UK nationals) are making a repeat visit to Britain.
- Most visits from Swiss residents to the UK were made by Swiss nationals (63%); 17% were made by British nationals.
- 93% of departing Swiss travellers are either ‘Very’ or ‘Extremely’ likely to recommend Britain for a holiday or short-break.
- 92% of departing Swiss felt ‘Very’ or ‘Extremely’ welcome in Britain.

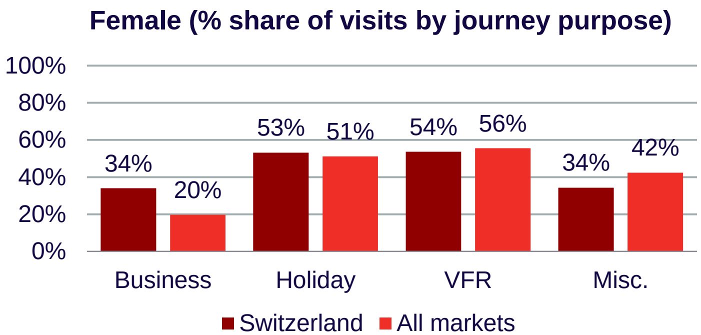
**93%**
‘Very’ or ‘Extremely’ likely to recommend Britain in 2016

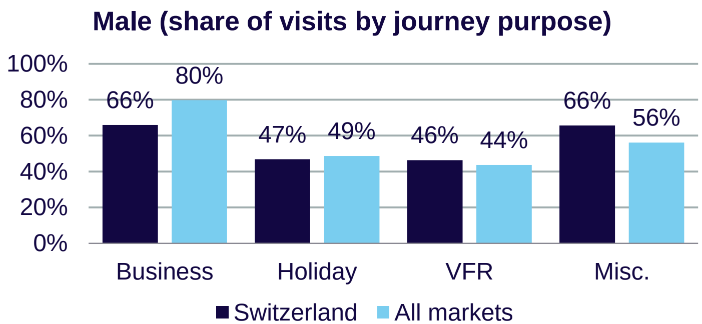
*Source: International Passenger Survey by ONS, CAA 2016 (asked to leisure visitors)*

# 1.2 Visitor demographics: gender and age groups

## Visitor demographics:

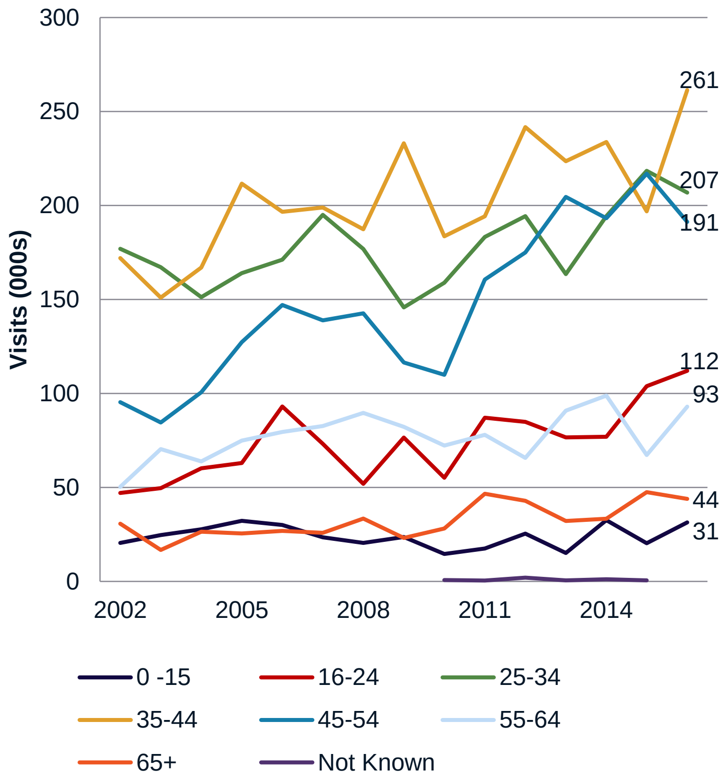
gender ratio of visits from Switzerland:
47% female, 53% male




*Source: International Passenger Survey by ONS*

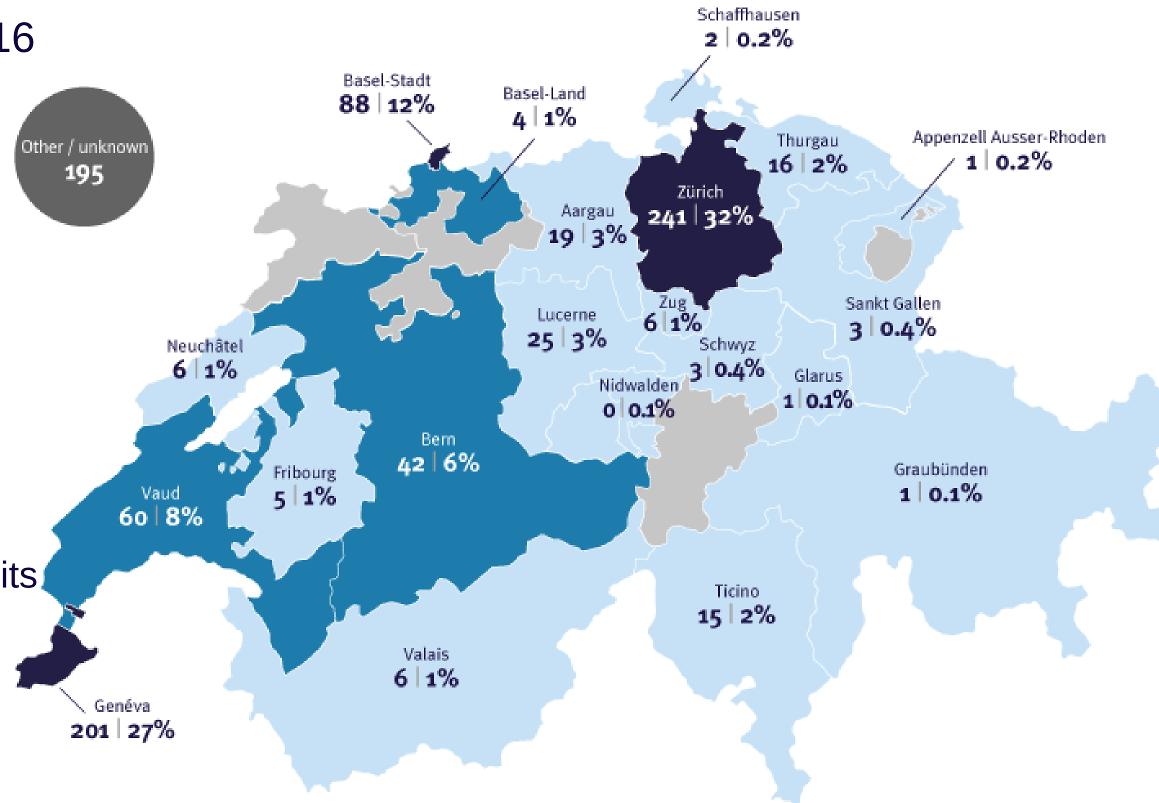
## Age group trend



# 1.2 Visitor demographics: origin

## Visits to the UK in (000) 2016

- The largest proportion of Swiss visitors who came to the UK reside in Zurich, Geneva and Basel-Stadt.



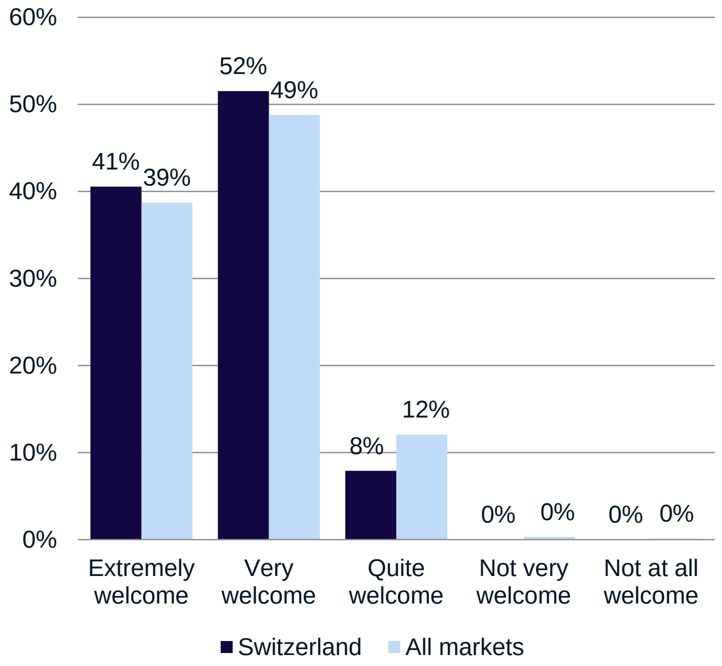

Visits in 000s | % share of visits

- High
- Medium
- Low

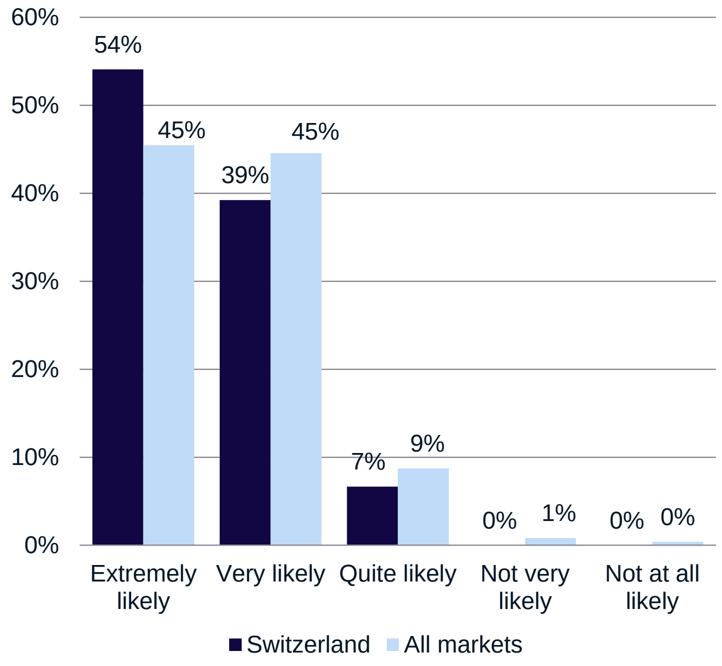
*Source: International Passenger Survey by ONS*

# 1.2 Visitor demographics: welcome and recommending Britain

## Feeling of 'welcome' in Britain




## Likelihood to recommend Britain




*Source: CAA 2016 (asked to leisure visitors)*

# 1.3 Britain and competitors

## Market size, share and growth potential

- Britain was the 6th most visited destination by Swiss travellers in 2016, behind France, Italy, Germany, Spain and Austria.
- Forecasts suggest there is the potential for continuous growth in the number of visits to Britain during the next decade.
- Whilst destinations like France and Italy lost some Swiss market share, Germany, Spain, Austria and the UK saw an increase in market share of Swiss overnight trips from 2011 to 2016.
- The number of trips taken by the Swiss increased to 3.1 overnight trips and 10.7 day trips per year (2015). 66% of the overnight trips were made abroad.

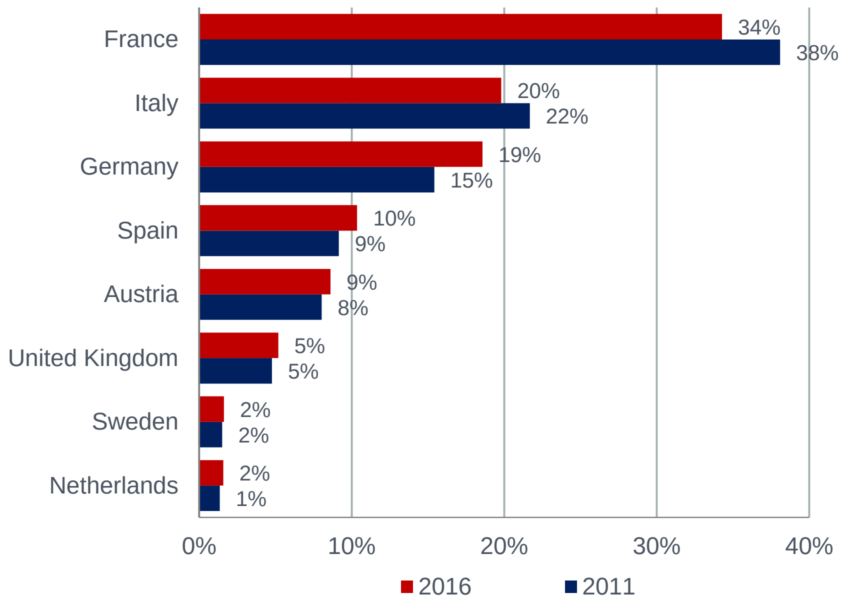
**Britain ranks 6th**

for Swiss outbound destinations by volume (2016)

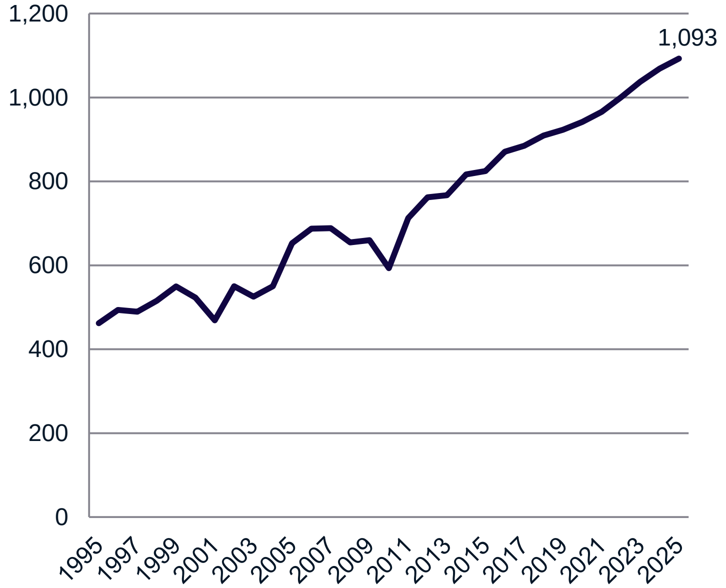
*Source: Oxford Economics (outbound overnight trips), Bundesamt für Statistik, base: Swiss residents aged 6+; 'Reiseverhalten der Schweizer Wohnbevölkerung 2015',*

# 1.3 Britain and competitors

## Britain's market share of Swiss visits among competitor set




## Historic and potential visits to Britain (000s)



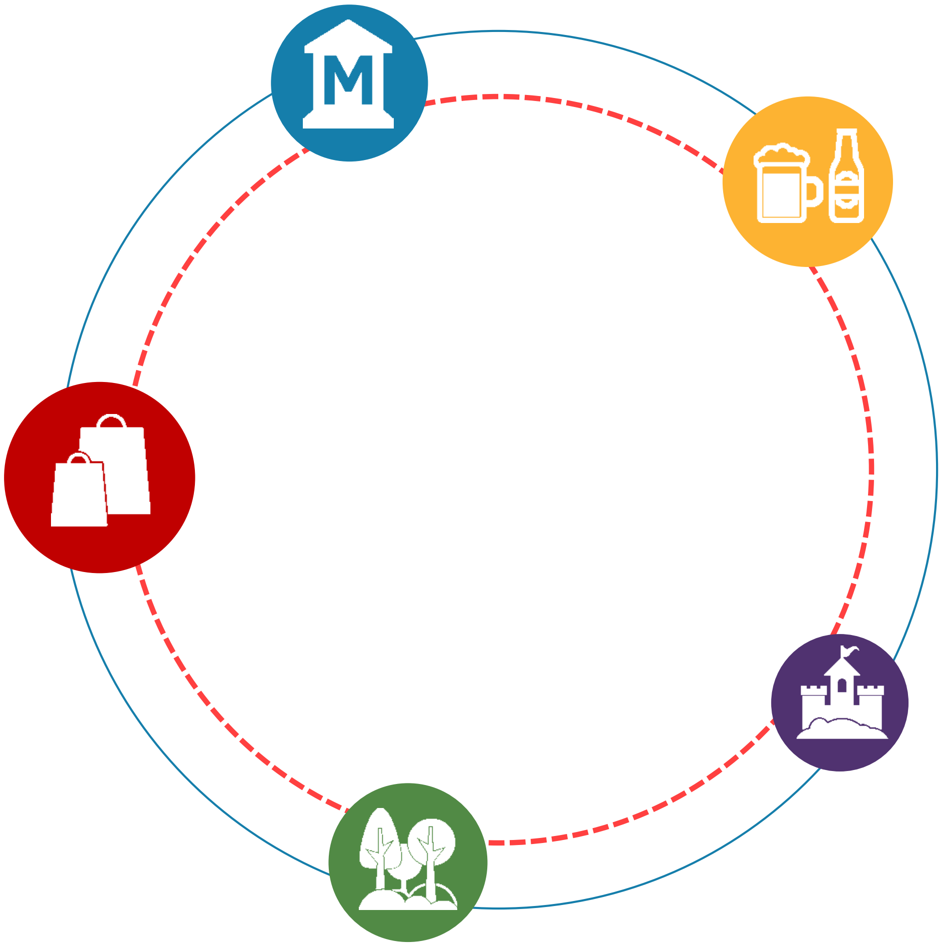

*Source: Oxford Economics (overnight visits)*

# 1.4 Inbound activities

## Inbound Britain activities

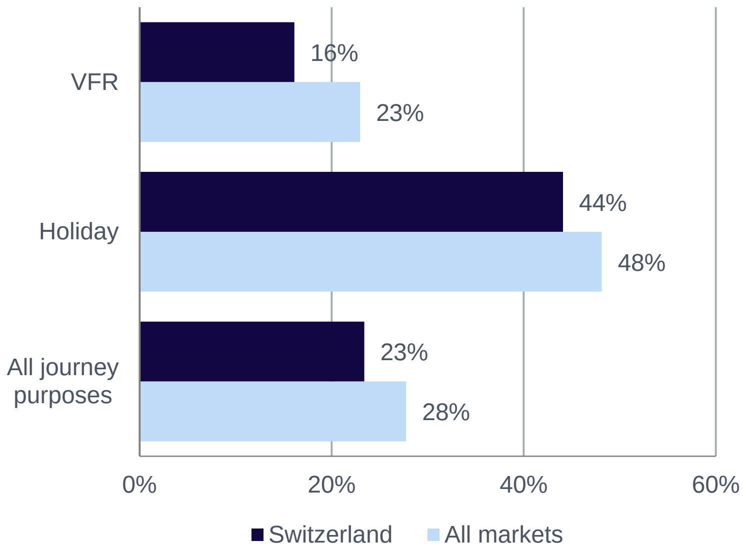
- Shopping is the number one activity which features in many Swiss visits.
- Most Swiss visitors like to dine in a restaurant or visit a pub while in Britain.
- Built heritage sites, and especially museums, are important attractions for many visitors from Switzerland.
- Half of holiday visits involve time in a park or garden. Walking in the countryside is also popular with many Swiss holiday or VFR visitors.
- About 22,000 visits per annum feature time watching football.
- Swiss holiday visitors have a slightly above average propensity to visit the performing arts during their stay in Britain.

*Source: International Passenger Survey by ONS, based on 2011 and 2016*

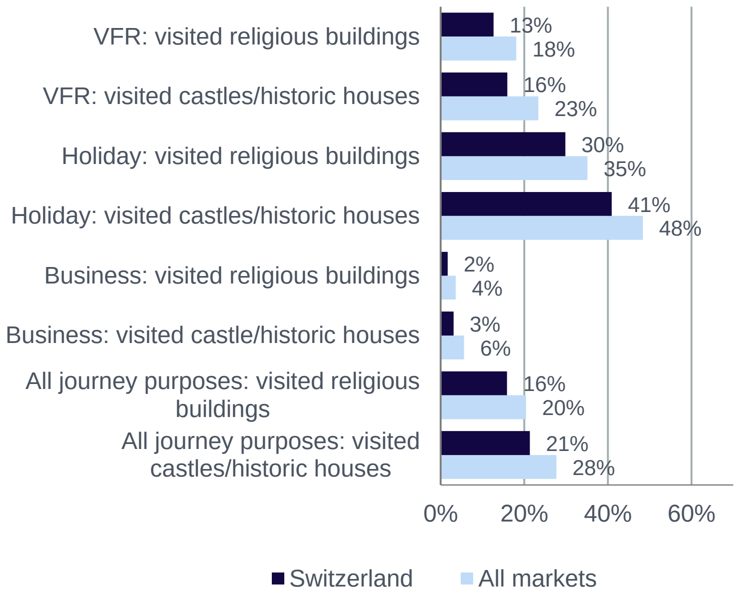


# 1.4 Inbound activities

## Propensity to visit museums and galleries



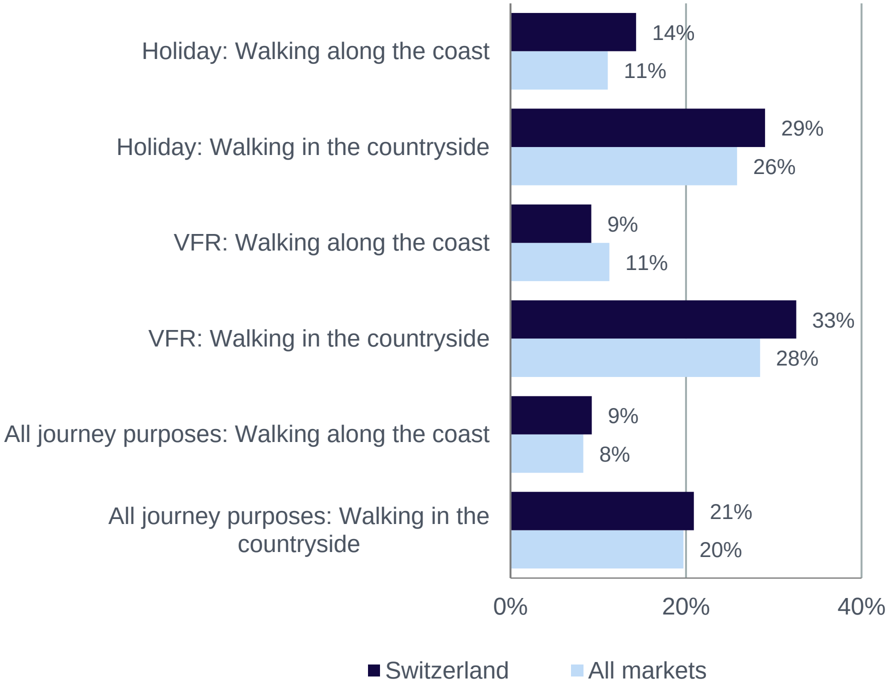

## Propensity to visit built heritage sites



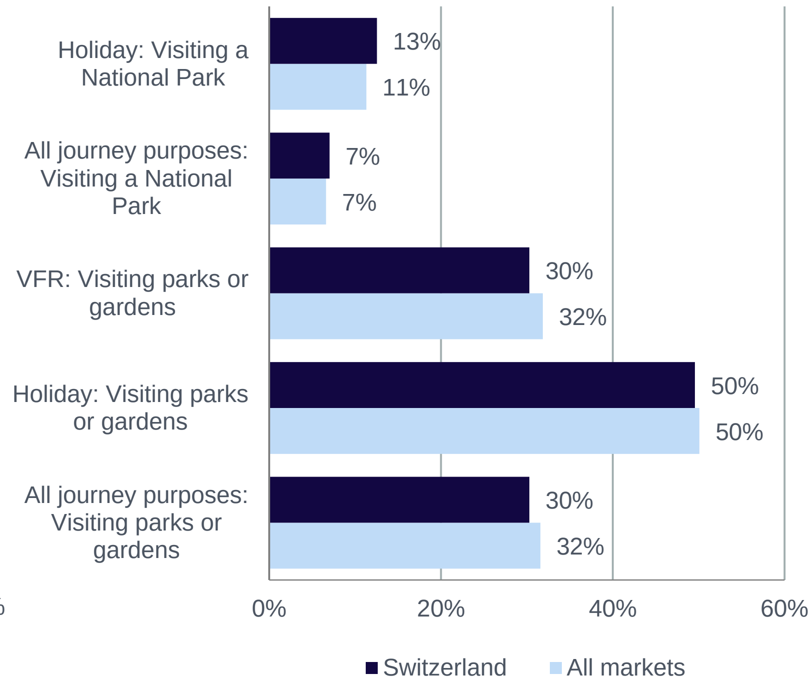

*Source: International Passenger Survey by ONS 2016*

# 1.4 Inbound activities

## Propensity to go for a walk along the coast or in the countryside



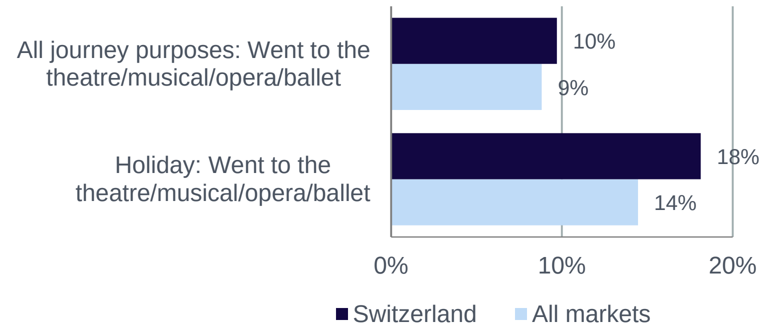

## Propensity to visit a park or garden or National Park



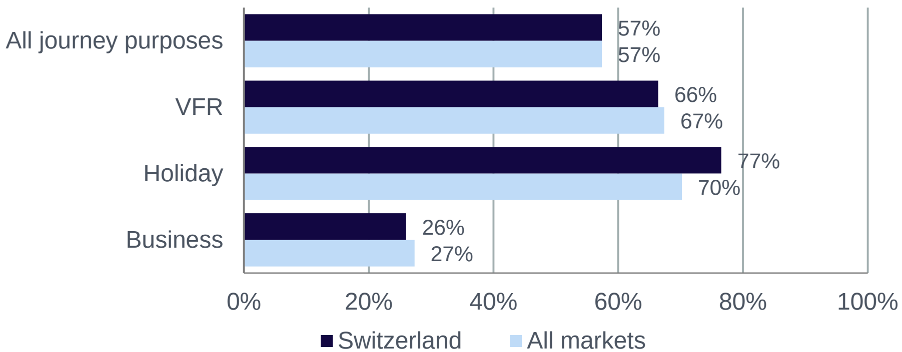

*Source: International Passenger Survey by ONS 2007, 2010 and 2016*

# 1.4 Inbound activities

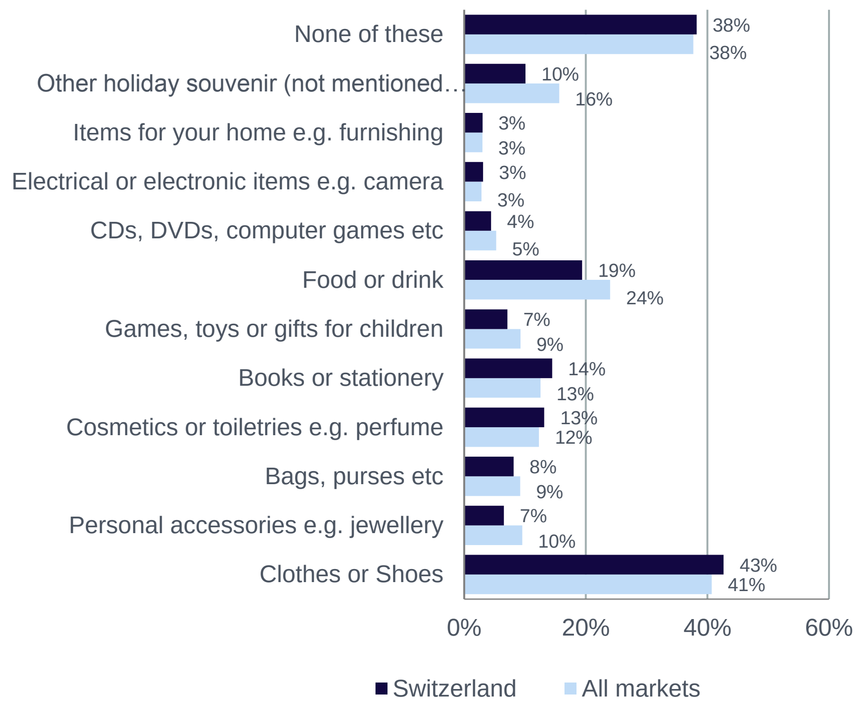
## Propensity to attend the performing arts




## Propensity to go shopping



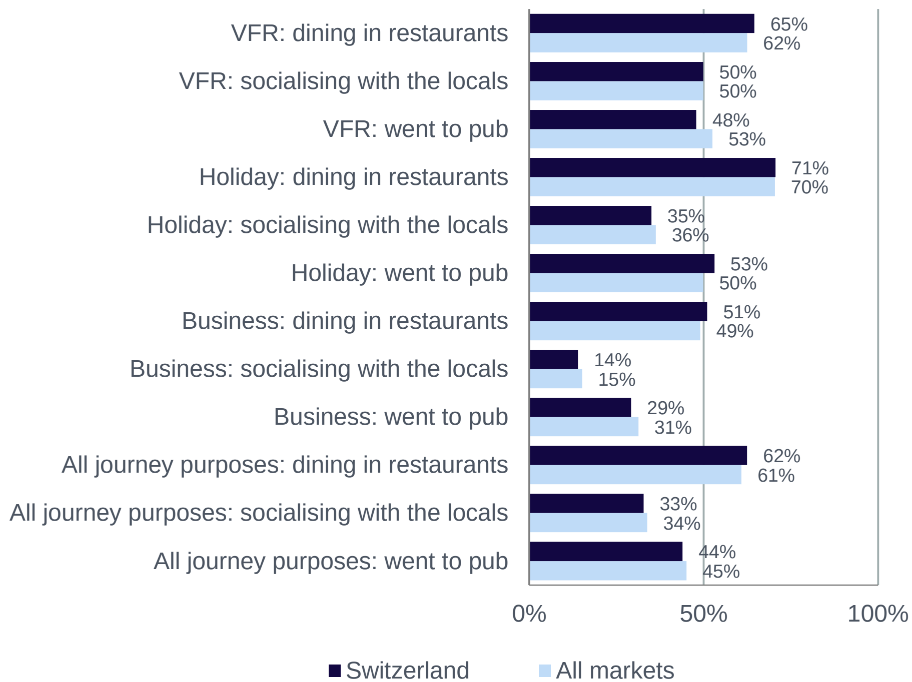

## Propensity to purchase selected items (%)



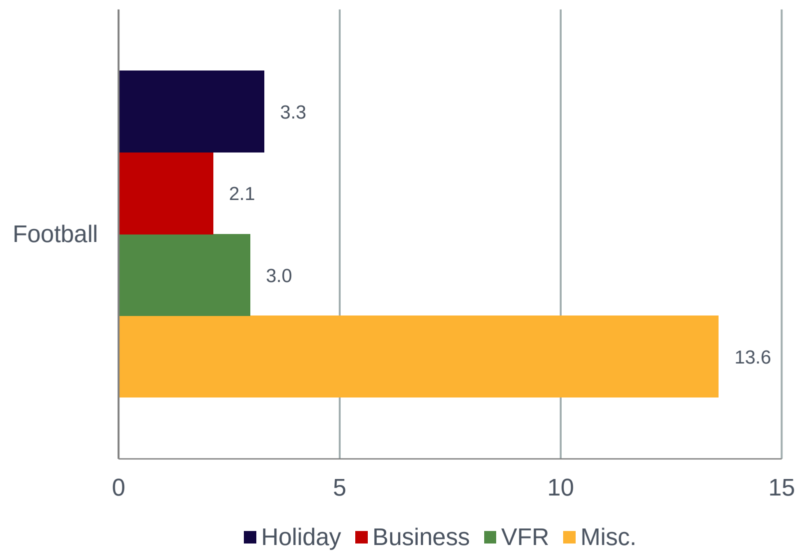

*Source: International Passenger Survey by ONS 2011 and 2016*

# 1.4 Inbound activities

## Propensity to go to restaurants, pubs, night clubs and socialise with locals




## Number who went to watch football live during trip (000s)




*Source: International Passenger Survey by ONS 2007, 2008, 2011 and 2013*

# Chapter 2:
# Understanding the market

# 2.Understanding the market

## Chapter summary

- Switzerland has a population of about 8.4 million.
- 88% of the Swiss resident population took at least one overnight trip of one or more nights away from home in 2015. Of the average 3 overnight trips per Swiss person, 66% were abroad.
- Holidays are very important or important to 77% of the Swiss and most would not do without them.
- Online sources and friends, family and colleagues are the most important inspiration for holiday ideas.
- Almost half of Swiss travel bookings were made more than 2 months ahead of the trip.
- 4 in 5 Swiss travellers look to relax and 'switch off' while they are on holiday and many love exploring foreign destinations and cultures.

**Getting to know foreign destinations and cultures**
Most popular activity for Swiss holiday-makers

*Source: Oxford Economcis, Bundesamt für Statistik, base: Swiss residents aged 6+; 'Reisen der Schwerizer Wohnbevölkerung 2015', Kuoni Ferienreport 2015, 'Buchungs- und Reiseverhalten der Schweizer Bevölkerung' by Medienkonferenz SRV/ Allianz Global Assistance – September 2016, IPSOS/EUROP ASSISTANCE 2017 'Summer holiday plans among Europeans and Americans' 17th ed.*

# 2.1 Structural drivers

## Demographics & society

- Population of about 8.4 million.
- Switzerland is a federal republic.
- There are 26 cantons: Aargau, Appenzell Ausserrhoden, Appenzell Innerrhoden, Basel-Landschaft, Basel-Stadt, Berne/Bern, Fribourg/ Freiburg, Geneve, Glarus, Graubünden/Grigioni/Grischun, Jura, Luzern, Neuchatel, Nidwalden, Obwalden, Sankt Gallen, Schaffhausen, Schwyz, Solothurn, Thurgau, Ticino, Uri, Valais/Wallis, Vaud, Zug and Zürich.
- The northern and western areas of Switzerland are populated more heavily than the higher Alps of the south.
- The official languages are German, French, Italian and Romansch; English is taught as a foreign language in school.
- The statutory minimum period of leave is four weeks for employees and apprentices over the age of 20 and five weeks for employees and apprentices up to the age of 20. This minimum may be increa-sed by contractual agreement. Collective labour agreements often provide for longer periods of leave, especially for employees with a specified number of years of service and/or of a certain age.

**8.4m**
Swiss population

*Source: Oxford Economics, CIA World Factbook 2017*

# 2.1 Structural drivers: population and economic indicators

## Population dynamics

| Measure | Estimate |
|---|---|
| Total population (2016) | 8,420,000 |
| Net No. migrants per 1,000 population (2017) | 5 |
| Average annual rate of population change in 2015 - 2020 | 1.0% |

## Economic indicators (% growth unless stated)

| Indicator | 2016 | 2017 | 2018 |
|---|---|---|---|
| Real GDP | 1.4% | 1.0% | 2.3% |
| Consumer spending | 1.5% | 1.3% | 1.6% |
| Unemployment rate | 3.3% | 3.2% | 3.0% |
| Average earnings | -0.1% | -0.1% | 1.4% |
| Consumer prices | -0.4% | 0.4% | 0.5% |

*Source: Oxford Economics, CIA World Factbook 2017*

# 2.1 Structural drivers: general market overview

## General market conditions

- Switzerland was Britain's 11th largest source market in terms of visits and 8th most valuable for visitor spending in 2016.
- The Swiss economy continues to grow at a moderate pace which is expected to pick up as a consequence of an upward trend in the labour market which is likely to benefit domestic demand and helped by the current depreciation of the Swiss franc against the euro. GDP growth in 2016 was 1.4% and is forecast to be 1.0% in 2017. (Oxford Economics)

## Key demographic and economic data

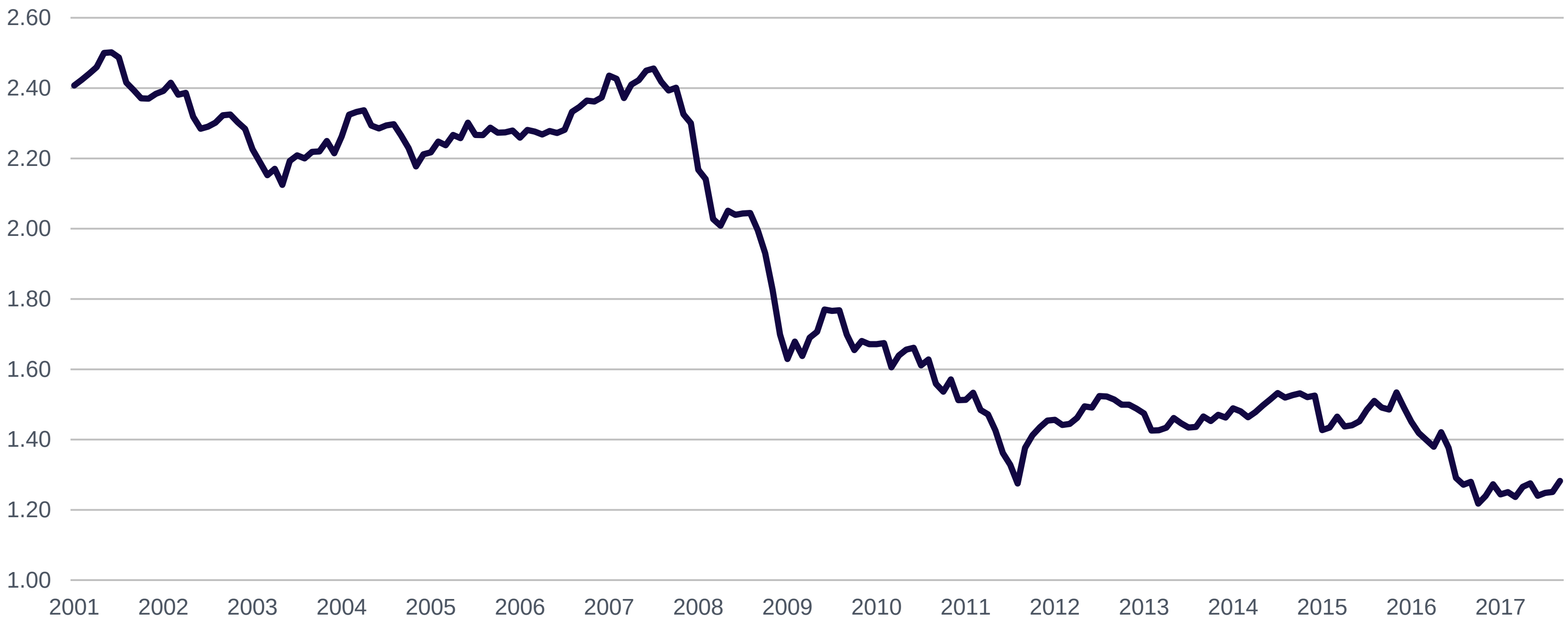
| Measure (2016 data) | Switzerland | Eurozone |
|---|---|---|
| Population (m) | 8.4 | 336.8 |
| GDP per capita PPP (US$) | 53,873 | 38,071 |
| Annual average GDP growth over past decade (%) | 1.7 | 0.6 |
| Annual average GDP growth in 2016 (%) | 1.4 | 1.7 |

- The country has a population of about 8 million with a median age of 42.
- Most people in Switzerland are well-educated and enjoy a high standard of living with GDP per capita in purchasing power parity terms of around US$54,000, forecast to increase in the years to come.
- According to the Capgemini World Wealth Report there were 358,000 High Net Worth Individuals (HNWI) resident in Switzerland in 2015, these being people with investible assets worth more than US$1 million, representing an increase of 4% on 2014. This represents the 7th largest HNWI population behind the US, Japan, Germany, China, the UK and France.

*Sources: Oxford Economics, Capgemini World Wealth Report 2016, CIA World Factbook 2017*

# 2.1 Structural drivers: exchange rate trends

## Exchange rate trends (cost of GBP in CHF)




Please find the most up-to-date exchange rate trend based on monthly averages at visitbritain.org/visitor-economy-facts.

*Source: Bank of England*

# 2.2 Consumer trends

- 88% of the Swiss resident population took at least one overnight trip of one or more nights away from home in 2015. Of the average 3 overnight trips per Swiss person, 66% were abroad.
- The average Swiss traveller abroad spent CHF152 per day in 2015.
- Whilst holidays and relaxation are the most important motivation to take a trip. Visits to family and/or friends have also seen a recent increase in volume.
- Almost one in five (18%) of Swiss private trips taken abroad were booked via a travel agency whilst virtually all domestic private trips were organised independently.
- Swiss holiday makers like to explore foreign cities and destinations and get to know their culture.
- Many Swiss have a love for the outdoors with hiking being one of the most popular leisure and sporting activities; this has seen an increase in interest in recent years.

88%

of the Swiss population took an overnight trip away from home of one or more nights in 2015.

*Source: Bundesamt für Statistik, base: Swiss residents aged 6+; 'Reiseverhalten der Schweizer Wohnbevölkerung 2015', Swiss Tourism in Figures 2016 by STV FST, Kuoni 'Ferienreport 2015'*

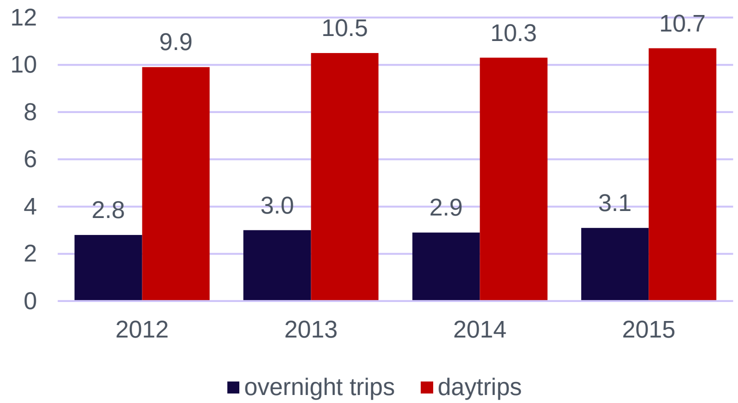
# 2.2 Consumer trends: overall travel trends

- 88% of the Swiss resident population took an overnight trip of one or more nights in 2015, with an equal share between men and women. Of these overnight trips, 66% were abroad. Most (88%) of the day trips were spent in Switzerland.
- The average Swiss traveller abroad spent CHF152 per day in 2015. On average, a Swiss person spent CHF984 on a private trip abroad and domestically CHF314 per person.
- 65% of trips abroad were 4 nights or longer. This means trips abroad were longer than the average domestic trip, of which the majority last between one and three nights.
- 62% of overnight trips in 2015 were taken in summer (May – October).
- Holidays were the key reason for travelling with 59% of trips being taken for this purpose. 69% of Swiss holidays were abroad. This was followed by trips taken to visit friends and/or relatives, which accounted for 25%, and showed a strong increase of a quarter more than in 2014.
- Business trips, most of which had a destination abroad, accounted for 6% of Swiss trips.
- The majority of private trips were holidays; average spend was CHF1,193 per person abroad and CHF430 per person on domestic holiday trips. Visits to friends and/or relatives accounted for a spend per person of CHF499 abroad and only CHF89 at home in Switzerland.
- Spend on private overnight trips abroad has seen an increase in both the summer and the winter season and spend varies slightly between men and women with men spending on average almost CHF70 more than women in 2015.

*Source: Bundesamt für Statistik, base: Swiss residents aged 6+; 'Reiseverhalten der Schweizer Wohnbevölkerung 2015', Swiss Tourism in Figures 2016 by STV FST*

# 2.2 Consumer trends: overall travel trends

## Average number of overnight and daytrips of Swiss travellers away from home for all journey purposes



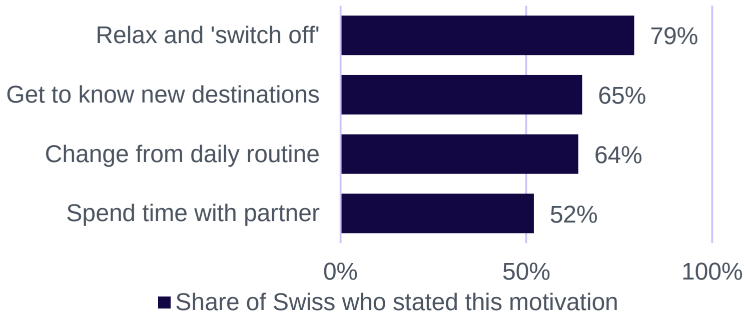

- The average Swiss traveller took 3 overnight trips and about 11 day trips in 2015, a slight increase on 2014.
- The German-speaking Swiss took 3.2 overnight trips per person, people from French-speaking areas 2.8 and those from the Italian-speaking parts of Switzerland took 2.3 trips.

- 34% of overnight trips taken by the Swiss in 2015 were domestic. 40% of the trips abroad had neighbouring countries as a destination (Germany, Italy and France were the most popular out of these). A further one in five trips went to other destinations within Europe and 7% outside Europe.
- Almost half of the Swiss population between 15 and 74 years of age said that they are active hikers/mountain hikers which made hiking the most popular leisure/sporting activity in Switzerland in 2014. The popularity of hiking has seen a steady increase in recent years. This love for the outdoors, the enjoyment of being active and health awareness might explain the popularity of activities involving time outside like in parks and gardens, walking in the countryside etc. when they are in Britain.

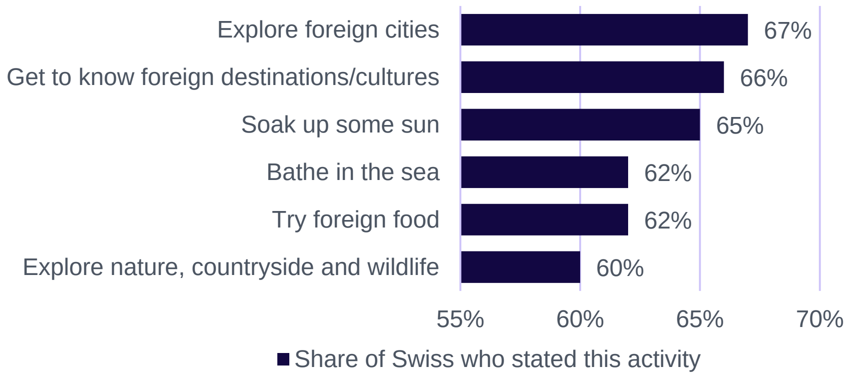
*Source: Bundesamt für Statistik, base: Swiss residents aged 6+; 'Reisen der Schwerizer Wohnbevölkerung 2015', Swiss Tourism in Figures 2016 by STV FST, Kuoni 'Ferienreport 2015'*

# 2.2 Consumer trends: overall travel trends

## Why holidays are important to the Swiss




## What do Swiss holidaymakers enjoy?




*Source: Kuoni 'Ferienreport 2015', IPSOS/EUROP ASSISTANCE 2017 'Summer holiday plans among Europeans and Americans' 17th ed.*

## Motivation and attitudes to holidays

- Holidays are very important or important to 77% of the Swiss and most would not do without them. More than one in two (55%) 18-29 year olds say they think holidays are indispensible.
- In 2017 66% of Swiss citizens planned to go on a holiday during the summer (above average for Europeans) with more than two in five planning to take two weeks, 25% one week and 18% three weeks.
- The top motivation for taking a holiday is relaxation and 'switching off', with almost 4 out of 5 Swiss saying that this is important to them during their holiday; among 18-29 year olds, this was even higher (84%).
- The Swiss have a love for exploring the unknown when they are abroad. Two thirds especially enjoy getting to know foreign cities, countries and cultures.
- Swiss women have a higher propensity to enjoy shopping when they are on holidays (41%) than men 30%). They in turn have a higher propensity to enjoy active sports when travelling (18%) than their female counterparts (11%).

# 2.3 Booking and planning

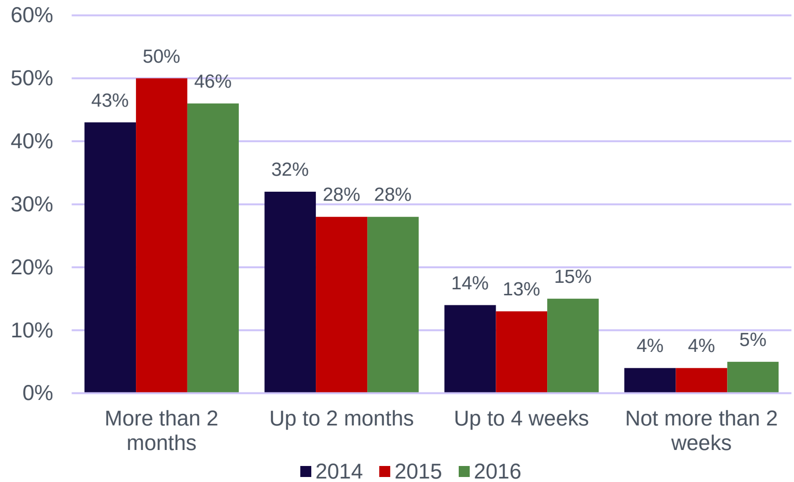
- A large proportion of the Swiss book their holidays more than 2 months in advance. 28% do so up to 2 months prior to their trip and 20% between 2 months and 2 weeks in advance.
- Most Swiss book their holidays or trips online. About one in five use a travel agency.
- Of those booking online, an almost equal share choose direct providers of the products/services and online travel agencies/ booking platforms.
- The most important reason to book through a travel agency is the quality of the service; personal relationships were cited by even more than the price.

46%
of Swiss travellers booked their holidays more than 2 months in advance in 2016

*Source:* 'Buchungs- und Reiseverhalten der Schweizer Bevölkerung' by Medienkonferenz SRV / Allianz Global Assistance – September 2016

# 2.3 Booking and planning: lead-times

## Timing for booking a trip or holiday




- Almost half of the Swiss book their holidays more than 2 months in advance (a slight decrease compared to 2015). 28% do so up to 2 months prior to their trip and 20% between 2 months and 2 weeks in advance.

*Source: :* 'Buchungs- und Reiseverhalten der Schweizer Bevölkerung' by Medienkonferenz SRV / Allianz Global Assistance – September 2016

- Most Swiss booked online in 2016, followed by about one in five who used a travel agency. Almost the same proportion said it varied and one in 10 preferred to organise a trip or holiday themselves. This has made the Internet the number one booking channel for Swiss private trips for several years in a row.
- 90% of the Swiss who book online use their PC or laptop; only 7% use a mobile website on a smartphone or tablet and very few an app on a smartphone or tablet.
- When asked which websites they use when they are booking online (respondents could state more than one), 64% of Swiss said they book directly with a provider of the products/services and a similar 66% use online travel agencies or booking platforms. 19% use a travel agency and 9% sharing economy platforms.
- The most important reasons for chosing to book via a travel agency was the quality of the consultation (69%) followed by personal relationships which was stated by nearly half, even more than those who stated the price (38%).

# 2.4 Reaching the consumer

- The most influential sources for travel inspiration are online sources and friends and family. 2 out of 5 Swiss use travel brochures.
- Visual content, i.e. photos, is the most inspiring type of content, cited by 3 out of 4 Swiss as a source of inspiration. This was followed by storytelling of travel experiences. Video content has an above-average influence on younger generations (up to 40 years of age).
- Whatsapp, Facebook, Google+, Instagram and Snapchat have the highest share of daily usage of social media services by Swiss people.
- The Swiss media landscape is characterised as multi-lingual, with German-, French- and Italian-spoken media.
- Daily TV consumption is highest in the Italian-spoken parts of Switzerland with an average of 171 mins., followed by 144 mins. in the French-spoken areas and 124 mins. in German-spoken parts.

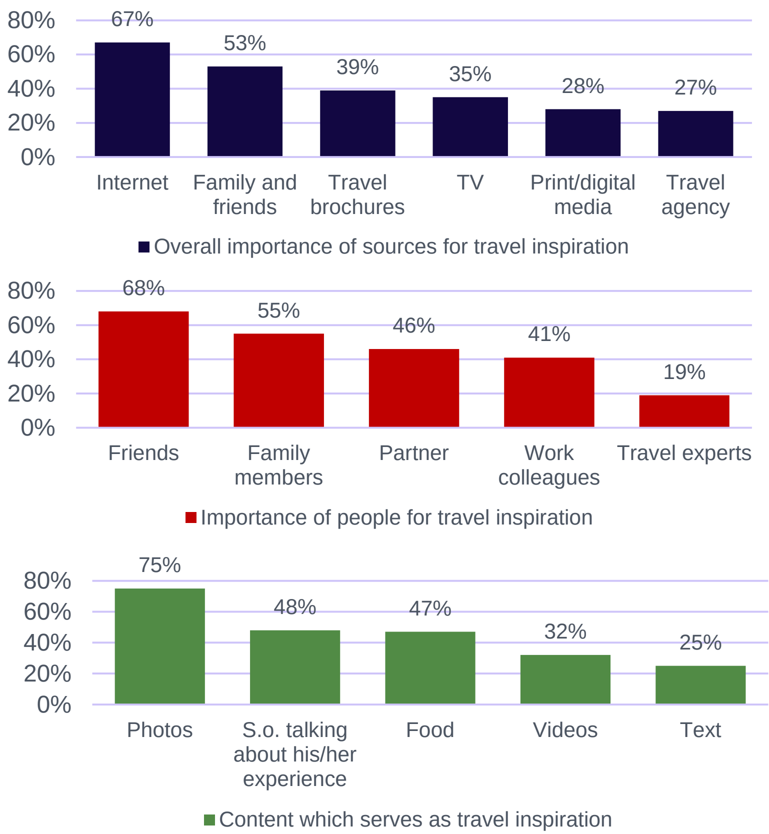
**Online sources and friends & family**

Most influential sources for travel inspiration for the Swiss

*Source: Kuoni 'Ferienreport 2015, EY Social Media Usage – Digital Nations: Switzerland 2017, Bundesamt für Statistik 'Medienangebot und -nutzung 2016 (aktualisierte Version)*

# 2.4 Reaching the consumer: influences

## Influences/Travel inspiration




*Source: Kuoni 'Ferienreport 2015'*

- Travel inspiration happens all the time as there are many sources which influence Swiss people in their choice. It tends to be less important for short-notice trips. There are regional differences notable in Switzerland showing that in the French- and Italian-spoken parts travel inspiration is even more important than in the German-spoken parts.
- Online sources as well as family and friends are the most influential sources of travel inspiration for the Swiss. Nearly 2 out of 5 Swiss use travel brochures. Travel experts are more important for those Swiss aged 50+ compared to the all-age-group average.
- More than half of 30-39 year olds get inspiration from their work colleagues – an above-average share. 40-49 year olds and single parents have an above-average propensity to be influenced by their children.
- Visual content – primarily photos – is the most impactful source of inspiration, cited by 3 out of 4 Swiss respondents, followed by stories someone tells about their experiences. Swiss women respond slightly more to imagery than their male counterparts. For the younger generation up to 40 years of age videos play an above-average role with nearly 2 out of 5 feeling inspired by this source.

# 2.4 Reaching the consumer: broadcast media, radio and papers

The Swiss media landscape is characterised as multi-lingual, i.e. primarily German-, French- and Italian-spoken media, with a few strong public broadcasters and a number of widely read free newspapers. Many Swiss also consume media from neighbouring countries Germany, France and Italy in their respective languages.

## Broadcast media

- Daily TV consumption is highest in the Italian-spoken parts of Switzerland with an average of 171 mins., followed by 144 mins. in the French-spoken areas and 124 mins. in German-spoken parts. Streaming of content online is also an increasing way of on consumption.
- In the TV landscape foreign channels hold a market share between 61% (German-spoken) and 70% (French-spoken), leaving a smaller share to the Swiss channels, mainly those produced by the SRG SSR. They include by language: German: SRF1, SRF2, SRFInfo. French: RTS Un, RTS Deux. Italian: RSI La Uno, RSI La Due.
- Commercial TV on a national level exists only in the German-speaking parts: STAR TV, Schweiz 5 and 3+. There are further regional channels which broadcast in their respective languages.
- Most of the dedicated travel programmes would be produced by foreign channels based in the neighbouring countries.

*Source: Reuters Institute/University of Oxford Digital News Report Switzerland, European Journalism Centre Media Landscapes Switzerland, Bundesamt für Statistik 'Medienangebot und -nutzung 2016 (aktualisierte Version)*

## Radio

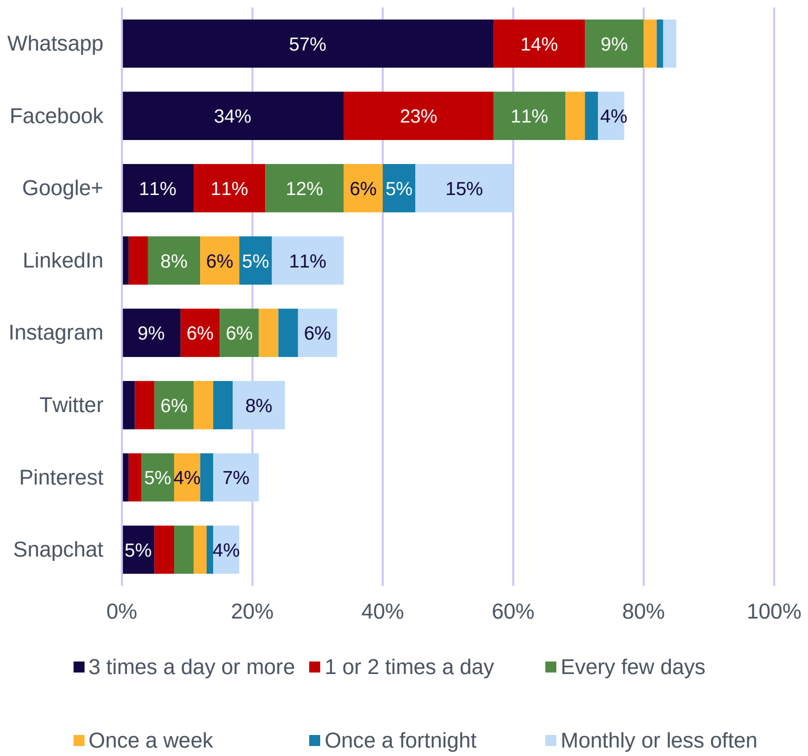
- There are 6 radio studios and 4 regional studios operated by SRG SSR which are multi-lingual and -cultural. They hold more than two thirds of Swiss radio consumption. Other Swiss stations by language include: German: SRF1, SRF2 Kultur, SRF3, SRF4 News, SRF Musikwelle and SRF Virus. French: La Première, Espace 2, Couleur 3 and Option Musique. Italian: Rete Uno, Rete Duo, Rete Tre. 1 Romansh station by RTR.
- Daily radio consumption is highest in the Italian-spoken parts with an average of 104 mins., followed by 102 mins. in the German-spoken areas and 83 mins. in French-spoken parts.

## Newspapers/print media

- Circulation of newspapers and other print media titles has seen a decline in recent years whilst the number of titles published has remained broadly stable. Many of the titles of online/digital editions.
- The two free papers 20 Minuten and Blick am Abend have the highest circulation of daily newspapers in German-spoken parts, followed by Blick, Tages-Anzeiger and Die Nordwestschweiz. Sunday dailies include: Sonntags Blick and Sonntags Zeitung and Schweiz am Sonntag. The most popular French-spoken dailies are (by readership): 20 minutes (free), Le Matin and 24 Heures, Sunday paper: Le Matin Dimanche. The most poplar Italian-spoken dailies (by readership): Corriere del Ticino plus, La Regione Ticino, 20 Minuti (free). Sunday papers: Il Caffè della Domenica and Il Mattino della Domenica (both free).

# 2.4 Reaching the consumer: social media

## Use of social media in Switzerland




- The use of social media has increased in Switzerland in recent years in line with many other markets.
- Whatsapp, Facebook, Google+, Instagram and Snapchat have the highest share of daily usage by Swiss people. Social networks like LinkedIn, Twitter and Pinterest have a higher propensity to be used every few days or less frequently.
- Facebook is the most important social network for travel influence and image-led platforms like Instagram and Pinterest are also popular sources for inspiration among Swiss people, especially for the younger age groups.
- 3 out of 4 Swiss holidaymakers have posted online reviews: 68% of a hotel, which is the most popular type of accommodation used for this market, 54% of a restaurant, 46% of a seasonal rental, 41% of an airline and 40% of a tourist attraction.

*Source: EY Social Media Usage – Digital Nations: Switzerland 2017 (Labels of less than 4% not displayed.), Kuoni 'Ferienreport 2015', IPSOS/EUROP ASSISTANCE 2017 'Summer holiday plans among Europeans and Americans 17th ed.*

# Chapter 3:
# Access and travel trade

# 3. Access and travel trade

- Access to Britain is easy. Almost all visits from Switzerland to Britain are made by plane.
- Annual airline seat capacity from Switzerland to Britain has increased strongly since 2013. More than three quarters of departing seats came in to the London airports in 2016. Easyjet, British Airways and SWISS operate most of the bulk of seat capacity.
- The Swiss trade structure is dominated by major generalist operators and a few specialist niche operators.
- The majority of operators are based in the greater Zurich area with a few exceptions especially in Basle and Geneva and other parts of Switzerland.
- Swiss consumers do not only book through Swiss operators but are also likely to consult offers by the German, French and/or Italian travel trade, depending on where they live in Switzerland.

**95%**

of visits to Britain from Switzerland were made by plane in 2016.

*Source: Apex Rdc 2016*

# 3.1 Access: key facts

- Virtually all visits to Britain from Switzerland are made by air. It is a short non-stop flight: usually between 1½ - 2 hrs flight time.
- Airline seat capacity has increased strongly since 2013. Capacity is also influenced by outbound winter sports travel from Britain to Switzerland.
- Geneva and Zurich are the airports with the highest volume of capacity destined for Britain, with more than three quarters of annual seats going to London area airports.
- Swiss visitors departing Britain by air pay £13 in Air Passenger Duty.

95% of Swiss visits to the UK are made by plane.

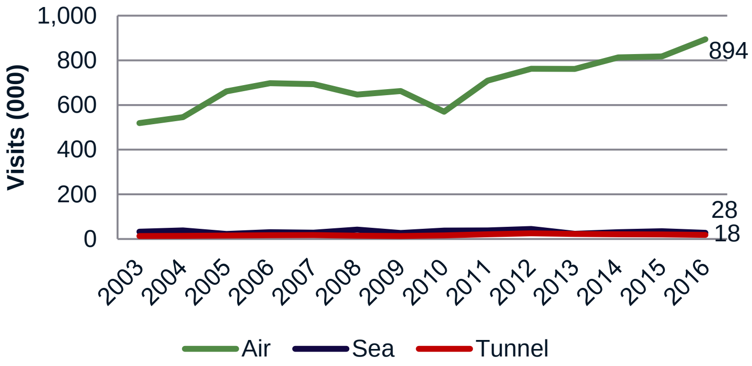
## Access to Britain

| Measure | 2016 |
|---|---|
| Weekly aircraft departures | 560 |
| Weekly aircraft seat capacity | 79,122 |
| Airports with direct routes in Switzerland | 4 |
| Airports with direct routes in Britain | 24 |

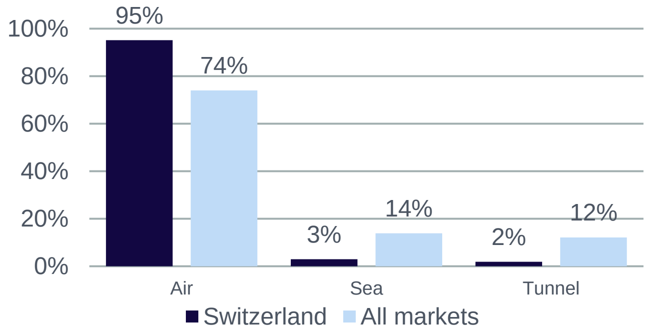
*Source: International Passenger Survey by ONS, Apex RdC 2016, non-stop flights only*

# 3.1 Access: mode of transport

## Visits by mode of transport

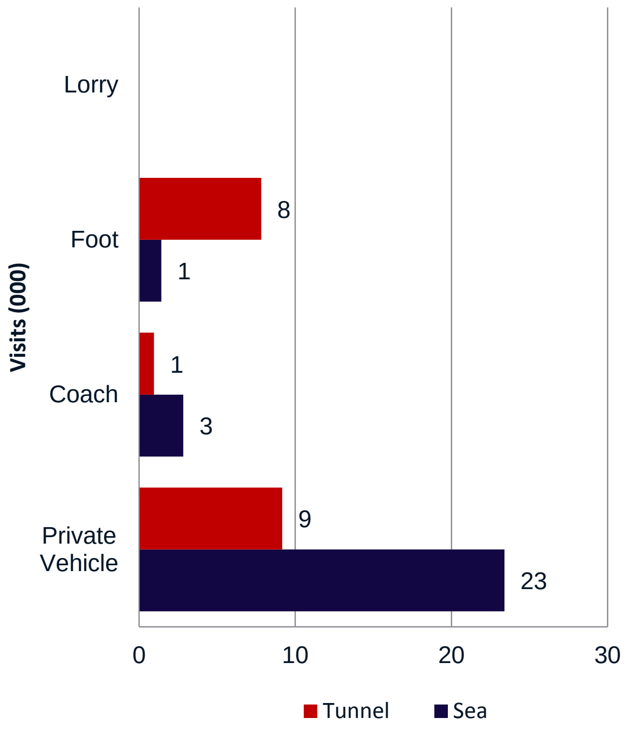



## Annual share by mode (2016)



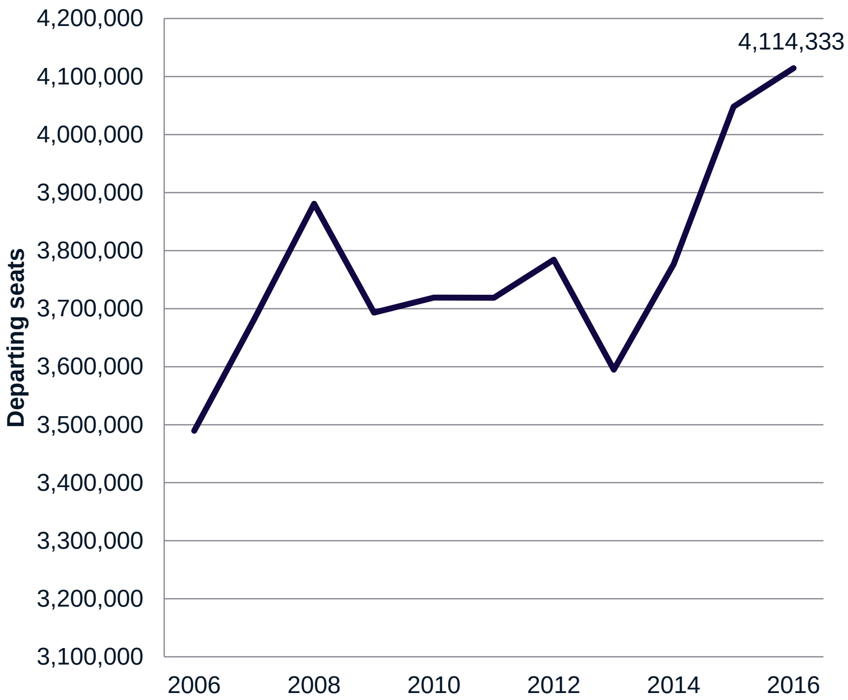

*Source: International Passenger Survey by ONS*

## Sea and tunnel travel (000s) in 2016

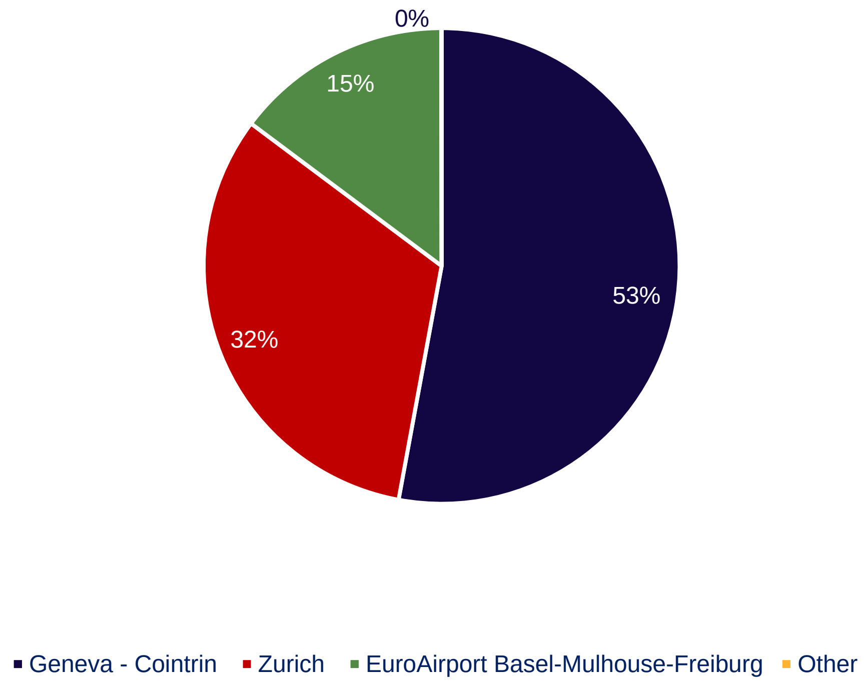


# 3.1 Access: capacity

## Annual airline seat capacity trends




## Origin airport annual seat capacity

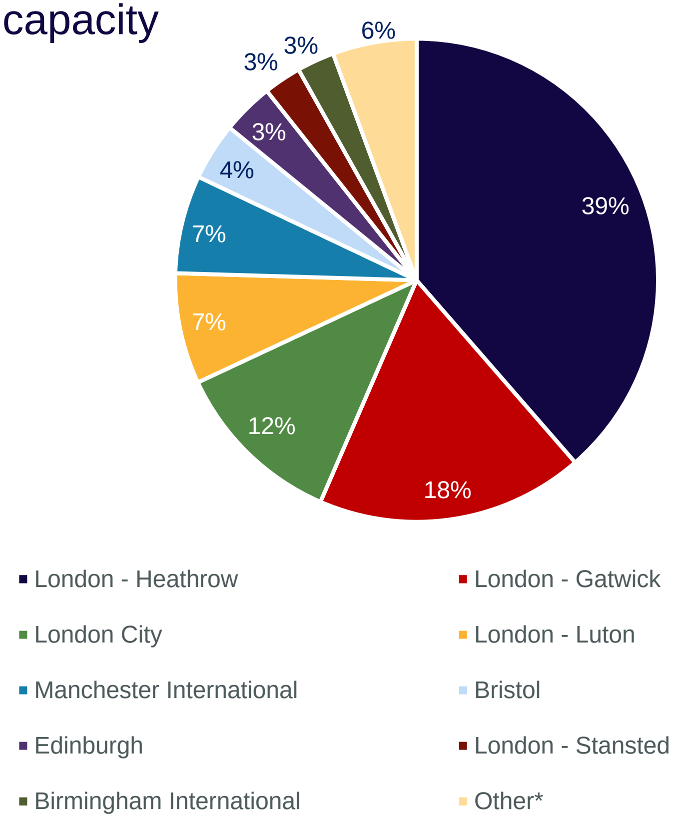



*Airport with less than 2% annual seat share grouped in other: Bern-Belp

*Source: Apex Rdc 2016: non-stop flights only*

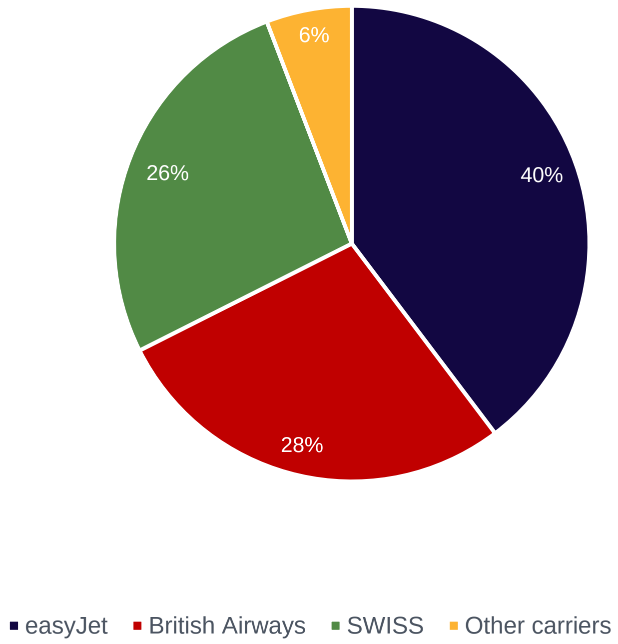
# 3.1 Access: capacity

## Destination airport annual seat capacity




*Source: Apex Rdc 2016: non-stop flights only*

## Airline seat capacity by carrier (2016)




*Airports with less than 2% annual seat share grouped in other: Liverpool John Lennon, Newcastle, Leeds/Bradford, London Southend, Bournemouth International, Belfast International, Glasgow International, Jersey, Southhampton, East Midlands, Exeter International, Aberdeen, Cardiff, Inverness, Isle of Man.

# 3.2 Travel trade: general overview

- The Swiss trade structure is dominated by major generalist operators and a few specialist niche operators.
- The majority of operators are based in the greater Zurich area with a few exceptions especially in Basle and Geneva and other parts of Switzerland.
- The major German operators (i.e. Dertour, Alltours, Neckermann and FTI) are now also increasingly active in Switzerland.
- Kuoni Reisen AG was the biggest travel group in Switzerland (and, among others, Scotland specialist Kontiki is part of it) but has been sold to the German Rewe group in summer 2015 and will gradually be merged with the Rewe branding. In July 2017 the name was changed into DER Touristik Suisse. The city break tours for Kuoni Reisen are operated by Railtour Suisse.
- TUI Switzerland offer the major British cities as part of their city tour programme. Contracting is done by the TUI Germany headquarters in Hanover.

**The Swiss trade structure is dominated by major generalist operators and a few specialist niche operators.**

# 3.2 Travel trade: Swiss tour operators

## Top operators in Switzerland

| Top Tour Operators |
|---|
| Hotelplan Suisse /Travelhouse |
| DER Touristik Suisse (former Kuoni Reisen AG) |
| TUI Suisse Ltd. |

Under the Travelhouse brand MTCH offer bespoke package products and Travel House Falcontravel is the sub-brand for Western Europe and Nordic destinations. Falcontravel has a dedicated London programme as well as programme/ catalogue for the whole of Britain. Both are very comprehensive and highly sophisticated and include upmarket as well as quirky products (e.g. lighthouse accommodation). MTCH AG/Travelhouse Falcontravel is the by far biggest Britain operator in Switzerland
The specialist operator for Nordic destinations and Scotland Kontiki Saga Reisen AG is fully owned by DER Touristik Suisse and has a very comprehensive and sophisticated Scotland programme.

## Major tour operators with a comprehensive Britain programme are:

travelhouse falcontravel

kontiki

TUI SUISSE

DER Touristik Suisse

# 3.2 Travel trade: Swiss holidays

## Public and local holidays

### National public holidays in 2018

| Date | National Holiday |
|---|---|
| 1 January | New Year's Day |
| 2 January | Saint Berchtold Day |
| 30 March | Good Friday |
| 2 April | Easter Monday |
| 1 May | May Day |
| 10 May | Ascension Day |
| 21 May | Whit Monday |
| 1 August | Swiss National Day |
| 15 August | Assumption Day |
| 1 November | All Saints Day |
| 8 December | Immaculate Conception |
| 25 December | Christmas Day |
| 26 December | St Stephen's Day |

Please note that many holidays are set by the individual cantons. However, New Year's Day, Ascension Day and Christmas Day are holidays in all cantons. Certain holidays are restricted to individual cities.

In the list on the left-hand side you find 2018 holiday dates which are valid for the majority of cantons.

# 3.2 Travel trade: practical information

## General practical information:

- Business hours are usually 08:00 – 12:00 and 14:00 – 17:00.
- When introduced expect to shake hands. Be careful of using first names as they are usually reserved for family and close friends. If your meeting is in French, please make sure you address people as “vous” not “tu” on the first appointment. You should wait until invited before using someone’s first name and “tu”. Similar applies to a meeting in German. Please address people as “Sie” not “du” on the first appointment.
- Dress code: Business dress tends to be conservative.
- Business Meeting Etiquette: Appointments are mandatory and should be made well in advance. This also applies to trade exhibitions as the Swiss trade often has tight meeting schedules. Reconfirm your appointment about a week in advance. Be punctual and allow for flexibility around the duration of the meeting.
- The Swiss are known for getting the best possible deal in negotiations without ever appearing aggressive or demanding. Through quiet self-confidence and a no-nonsense approach to business they sidestep 'hardsell' and other high-pressure tactics. In addition, they do not like to rush a decision until they have properly examined all the facts and information and reported these to the decision maker.
- Straight-forward and direct communication and an action plan are appreciated. If you require a decision from your trade partner make sure that you allow enough time and that it fits within their planning cycle.
- On your return to Britain ensure that you follow up quickly and renew contact regularly.

# 3.2 Travel trade: sales calls

## Sales calls

The Swiss trade structure is dominated by major generalist operators and a few specialist niche operators. The majority of operators are based in the greater Zurich area with a few exceptions especially in Basle and Geneva and other parts of Switzerland. Therefore, before you embark on a sales visit to Switzerland, VisitBritain recommends that you take the following steps:

- Send an introductory e-mail/letter and provide the operators you are visiting with a comprehensive information pack about your products (does not necessarily have to be in German, French or Italian - English is fine).
- Consider the timing of your visit. The large tour operators research their main season programmes between April and June. Some may visit Britain during this time to contract accommodation and visit new attractions, regions, products to be included. The prices for these programmes are determined between July and September and launched in November/December.
- The smaller specialist operators research their programmes slightly later, July/September for a launch in January/February. Off-season/city-break operators research their winter programmes in March/April, to launch in July/August. Check to ensure that your trip does not coincide with a public holiday. Many people choose to take a long weekend around these dates, especially in the spring and summer.
- Switzerland has one of the best public transport systems in the world and you can get virtually everywhere in Switzerland by train, bus, tram or ferry. Driving in Switzerland can be difficult for those who are not used to driving in the mountains or in the snow.
- On your return to Britain ensure that you follow up quickly and renew contact regularly.
- Keep in touch with VisitBritain; let us know about your progress. Regular market intelligence is essential for our future plans and activities.
- It is also important to note that a significant number of the key Britain players attend the VisitBritain's ExploreGB workshop, Best of Britain, BIM Marketplace and VisitScotland Expo. Please contact VisitBritain London for details of those attending. Some operators also visit World Travel Market but register with the organisers independently.

# 3.2 Travel trade: hospitality etiquette

## Hospitality etiquette

If there is the opportunity it is definitely a good idea to take your Swiss business partner out for a meal – either to build up a relationship or to thank for business given in the past. Here are some practical tips to help you plan this:

- Credit cards are usually accepted in all restaurants (only double check with the small ones) VISA and Mastercard are most accepted but in some restaurants American Express cards are not accepted.
- Arrive on time and if possible, before the invite, as punctuality indicates reliability.
- If you order water you will be asked if you want mineral still or sparkling. In some restaurants you may request tap water, but it might happen that you will be charged for this.
- Service charge and VAT are included in the price. Rounding up to the next Swiss Franc for small amounts or giving a couple of Swiss Francs when spending larger amounts in expensive restaurants is common when you are happy with the service.

# 3.3 Caring for the consumer

## Caring for the consumer

- Swiss travellers tend to like to plan for most activities in advance of their trip and enjoy gathering comprehensive information about activities and places to visit ahead of their stay.
- It would be advantageous to have important signs and information material printed in German and French and to know a few basic phrases in French and German to make Swiss visitors welcome. The degree of fluency in English tends to vary.
- Swiss visitors tend to be quality and service driven when it comes to choosing accommodation. They often are experienced travellers and due to relatively high price levels in their own country tend to be prepared for good quality but would then also expect a high standard. Almost a third pay attention to opinions of other travellers e.g. voiced in reviews.
- They are often interested in high-end and upmarket accommodation (mainly hotels and B&Bs). Country house and golf hotels are popular as is quirky accommodation with character.

## Language basics*

| English | German | French |
|---|---|---|
| Please | Bitte | S'il vous plaît |
| Thank you | Danke | Merci |
| Yes | Ja | Oui |
| No | Nein | Non |
| Sorry! (apology) | Entschuldigung! | Désolé(e) ! / Veuillez m'excuser ! |
| Excuse me! | Entschuldigen Sie, bitte! | Excusez-moi ! / Pardon ! |
| Sorry, I do not speak German/French. | Entschuldigung, ich spreche leider kein Deutsch. | Excusez-moi mais je ne parle pas français. |

**Please note that German and French are listed here as the most spoken languages in Switzerland. The two other official languages in Switzerland are Italian and Romansch.*

*Source: IPSOS/EUROP ASSISTANCE 2017 'Summer holiday plans among Europeans and Americans 17th ed.*

# 3.3 Caring for the Consumer

## Caring for the Consumer:

- Swiss perceptions of British food tend to be below average.
- As for all other aspects of Swiss life, there are considerable differences between the German, French and Italian speaking parts of Switzerland when it comes to food and drink as they are heavily influenced by German, French and Italian tastes and cuisine and tastes, habits and meal times differ depending on where Swiss visitors come from.
- In Switzerland the common time for breakfast is between 6am and 8am but when on holiday times depend on the programme for the day. The common time for lunch is usually between 12 noon and 1pm but when travelling times are more flexible. Supper or dinner is eaten between 6pm and 8pm.
- Swiss travellers often see a cooked breakfast as part of the overall British (holiday) experience. Traditionally, the Swiss eat croissants, bread and bread rolls with a selection of jam, cold cuts and cheese for breakfast and of course their world-famous muesli. The majority of Swiss people drink coffee – usually strong.
- Especially on a touring holiday Swiss travellers are keen to explore local food and produce. Organic food is very popular in Switzerland and also appreciated when on holiday.
- Swiss touring around more rural areas sometimes complain that they struggle to find restaurants still open by the time they have found and reached their accommodation as in Switzerland restaurants usually stay open longer.
- The Swiss are used to and comfortable with paying by credit card.

*Source. GfK Anholt Nation Brands Index 2007*

# 3.3 Caring for the consumer: German and French language tips

## Language tips for arrival and departure*

| English | German | French |
|---|---|---|
| Hello | Hallo | Bonjour ! |
| My name is… | Ich heiβe… | Je m'appelle… |
| Welcome to Britain | Willkommen in Groβbritannien | Bienvenue en Grande-Bretagne ! |
| Pleased to meet you! | Ich freue mich Sie kennenzulernen. | Enchanté(e) |
| How are you? | Wie geht es Ihnen? | Comment allez-vous ? |
| Enjoy your visit! | Genieβen Sie Ihren Aufenthalt! | Bon séjour ! / Bonne visite ! |
| Goodbye | Auf Wiedersehen! | Au revoir ! |
| Did you enjoy your visit? | Hatten Sie einen schönen Aufenthalt? | Avez-vous apprécié votre séjour ? |
| Have a safe journey home! | Ich wünsche Ihnen eine sichere Heimreise! | Bon retour ! / Bon voyage ! |
| Hope to see you again soon! | Auf ein baldiges Wiedersehen! | A bientôt ! |

**Please note that German and French are listed here as the most spoken languages in Switzerland. The two other official languages in Switzerland are Italian and Romansch.*

# 3.4 Working with VisitBritain

We can help you extend your reach through:

- Digital and social media such as through Twitter, our Facebook page – Love GREAT Britain, or Pinterest.
- Press and PR by sending us your newsworthy stories or hosting our journalists and broadcast crew
- Leisure, and the business travel trade via our programme of sales missions, workshops and exhibitions or promotion to our qualified Britagents and supplier directory
- Print advertising in targeted media/Britain supplements
- Retailing your product through the VisitBritain shop
- Or as a major campaign partner

We are here to support you and look forward to working with you.

To find out more browse our opportunity search (visitbritain.org/opportunities)

or trade website (trade.visitbritain.com)

or contact the B2B events team (Email: events@visitbritain.org)

or campaign partnerships team (Email: partnerships@visitbritain.org)

or trade support team (Email: tradesupport@visitbritain.org)

# 3.5 Useful research resources

We have dedicated research and insights available which include:

- Latest monthly and quarterly data from the International Passenger Survey by ONS (visitbritain.org/latest-monthly-data visitbritain.org/latest-quarterly-data-uk-overall visitbritain.org/latest-quarterly-data-area)
- Inbound Tourism Trends by Market visitbritain.org/inbound-tourism-trends
- Sector-specific research visitbritain.org/sector-specifc-research
- 2017 Inbound Tourism Forecast visitbritain.org/forecast
- Britain's competitiveness visitbritain.org/britains-competitiveness

We are here to support you and look forward to working with you.

To find out more about the Swiss or other inbound markets browse

our markets & segments pages or (visitbritain.org/markets-segments)

our inbound research & insights or (visitbritain.org/inbound-research-insights)

contact us directly
(Email: research@visitbritain.org)

# Market and
# Trade Profile: Switzerland