

# Research Report Luxembourg.

## Tourism goals: summary

**Market size & growth:** In 2019, the Luxembourg market recorded 0.104 million overnights<sup>1)</sup> in Switzerland and 0.096 million overnights in 2022. With a market share of 0.26%, Luxembourg was the 28<sup>th</sup> highest ranked source market (out of a total of 33 ST markets) in 2019. The growth rate for overnights was 16.1% between 2015 and 2019. Between 2019 and 2022, the development was -7.3%. The corresponding growth ranking was 13 and 13 respectively.

**Economic value:** Luxembourg ranks 22<sup>nd</sup> with a daily expenditure value of CHF 190 (TMS 2017) and ranks 12<sup>th</sup> with a 48.4% share of \*\*\*\*/\*\*\*\*\* nights in 2019.

**First time visitors & length of stay:** With a 9.8% figure for first-time visitors, Luxembourg ranks 32<sup>nd</sup> (TMS 2017). With a length of stay of 2.45 overnights it ranks 5<sup>th</sup>.

**Balance:** In 2019, the 50 largest Swiss destinations accounted for 72.0% of overnights from Luxembourg, while the percentage split amongst the small<sup>2)</sup> and very small<sup>3)</sup> destinations was 18.3% (=rank 16) and 9.7% (=rank 11) respectively. Finally, the percentage split of the low season months "March-May" and "September-November" was 20.1% (=rank 30) and 16.1% (=rank 32), respectively.

<sup>1)</sup> nights in hotels, unless otherwise stated

<sup>2)</sup> 51<sup>st</sup> -200<sup>th</sup> largest destinations

<sup>3)</sup> 201<sup>st</sup> largest destination and smaller

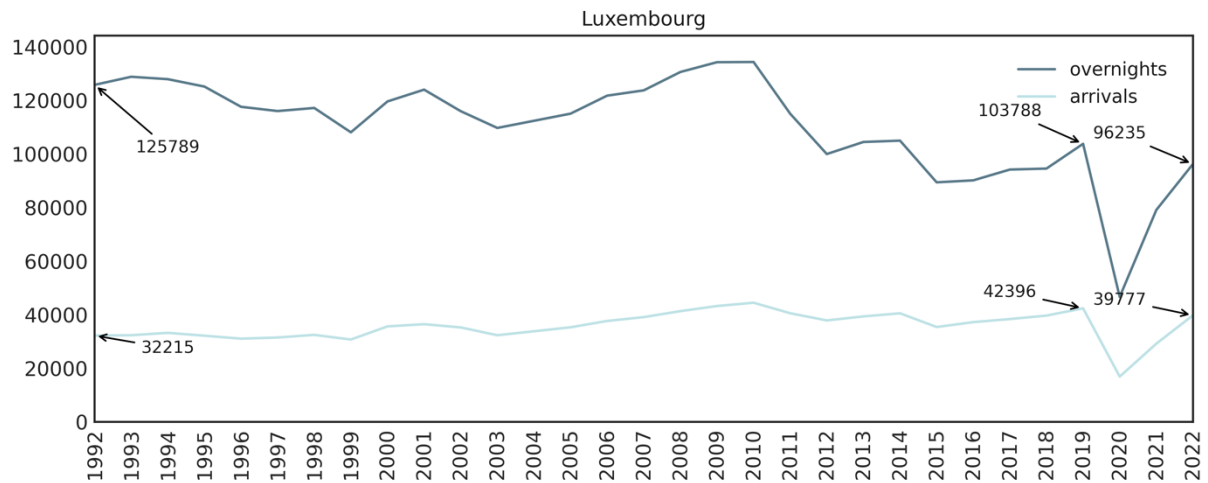
|                         |   | value    | rank |
|-------------------------|---|----------|------|
| 1. market size & growth | 2019  | 0.104 M. | 28   |
|                         | 2022  | 0.096 M. | 28   |
|                         | 2015-19   | 16.1%    | 13   |
|                         | 2019-22   | -7.3%    | 13   |
| 2. economic value       | daily expenditures 2017 (TMS)   | 190      | 22   |
|                         | share ****/*****-nights 2019  | 48.4%    | 12   |
| 3. first time visitors  | share 2017 (TMS)  | 9.8%     | 32   |
| 4. length of stay       | 2019  | 2.45     | 5    |
| 5. balance              | share off-season "March-May" of total year 2019                             | 20.1%    | 30   |
|                         | share off-season "Sept-Nov" of total year 2019                              | 16.1%    | 32   |
|                         | share small destinations (51 <sup>st</sup> -200 <sup>th</sup> largest) 2019 | 18.3%    | 16   |
|                         | share very small destinations (201 <sup>st</sup> +) 2019                    | 9.7%     | 11   |

Source: FSO/hotel statistics, unless otherwise stated

**Regions and destinations with a high market affinity:** In 2019, guests from Luxembourg typically preferred the regions of: Graubünden, Wallis and Tessin. Moreover, these guests were most overrepresented in the five destinations of: Ormont-Dessus, Kandersteg, Beckenried, Adelboden and Laax.

Source: FSO/hotel statistics

## Overnight volume & development.



| overnights share of...               | 2010 | 2015 | 2019 | 2021 | 2022 | rank<br>2019 |
|--------------------------------------|------|------|------|------|------|--------------|
| ...all markets                       | 0.4% | 0.3% | 0.3% | 0.3% | 0.3% | 28           |
| ...markets abroad                    | 0.7% | 0.5% | 0.5% | 0.9% | 0.6% | 27           |
| ...nearby markets (Europe, excl. CH) | 0.9% | 0.8% | 0.8% | 1.2% | 0.9% | 15           |

Source: FSO/hotel statistics

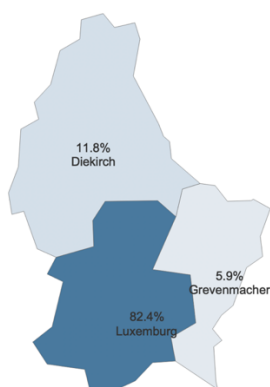
## Other key metrics.

|  | 2010    | 2015    | 2019    | 2021    | 2022    | rank<br>2019 | development |                 | development |                 |
|--|---------|---------|---------|---------|---------|--------------|-------------|-----------------|-------------|-----------------|
|  |         |         |         |         |         |              | 2015-19     | rank<br>2015-19 | 2019-22     | rank<br>2019-22 |
| overnights in millions                 | 0.134   | 0.089   | 0.104   | 0.079   | 0.096   | 28           | 16.1%       | 13              | -7.3%       | 13              |
| length of stay (overnights/arrivals)   | 3.020   | 2.525   | 2.448   | 2.709   | 2.419   | 5            | -5.0%       | 15              | -2.0%       | 30              |
| density (overnights/1'000 inhabitants) | 264.329 | 156.522 | 166.988 | 122.797 | 145.923 | 2            | 6.7%        | 22              | -12.6%      | 16              |
| GDP per capita in USD                  | 110'601 | 105'074 | 112'294 | 132'602 | 122'062 | 1            | 6.9%        | 26              | 8.7%        | 15              |
| population in millions                 | 0.508   | 0.571   | 0.622   | 0.644   | 0.659   | 34           | 8.8%        | 2               | 6.1%        | 1               |

Source: FSO/hotel statistics | Oxford Economics: GDP & population

## Guest origin.

(leisure tourists in Swiss hotels & supplementary accommodations)



|              | overnight-<br>share | inhabitant-<br>share |
|--------------|---------------------|----------------------|
| Luxemburg    | 82.4%               | 72.7%                |
| Diekirch     | 11.8%               | 15.3%                |
| Grevenmacher | 5.9%                | 12.0%                |

source: TMS 2017 public source

## Geographical distribution in Switzerland.

### Total

|       | overnights in millions |       |       |       |       | ON share |      | ON development |         | ON development |         |
|-------|------------------------|-------|-------|-------|-------|----------|------|----------------|---------|----------------|---------|
|       | 2010                   | 2015  | 2019  | 2021  | 2022  | rank     |      | rank           |         | rank           |         |
|       |                        |       |       |       |       | 2019     | 2019 | 2015-19        | 2015-19 | 2019-22        | 2019-22 |
| total | 0.134                  | 0.089 | 0.104 | 0.079 | 0.096 | 0.3%     | 28   | 16.1%          | 13      | -7.3%          | 13      |

### Large vs. small destinations

|  | overnights in millions |       |       |       |       | ON share |      | ON development |         | ON development |         |
|--|------------------------|-------|-------|-------|-------|----------|------|----------------|---------|----------------|---------|
|  | 2010                   | 2015  | 2019  | 2021  | 2022  | rank     |      | rank           |         | rank           |         |
|  |                        |       |       |       |       | 2019     | 2019 | 2015-19        | 2015-19 | 2019-22        | 2019-22 |
| large destinations (top 10)            | 0.041                  | 0.032 | 0.038 | 0.026 | 0.034 | 0.3%     | 32   | 17.9%          | 17      | -10.5%         | 16      |
| mid-sized destinations (11-50)         | 0.059                  | 0.034 | 0.037 | 0.033 | 0.034 | 0.3%     | 25   | 9.8%           | 19      | -8.4%          | 20      |
| small destinations (51-200)            | 0.023                  | 0.016 | 0.020 | 0.014 | 0.019 | 0.2%     | 27   | 25.1%          | 8       | -4.7%          | 7       |
| very small destinations (201-smallest) | 0.011                  | 0.008 | 0.009 | 0.006 | 0.009 | 0.2%     | 25   | 17.4%          | 9       | 5.4%           | 8       |

### Tourism zone

|              | overnights in millions |       |       |       |       | ON share |      | ON development |         | ON development |         |
|--------------|------------------------|-------|-------|-------|-------|----------|------|----------------|---------|----------------|---------|
|              | 2010                   | 2015  | 2019  | 2021  | 2022  | rank     |      | rank           |         | rank           |         |
|              |                        |       |       |       |       | 2019     | 2019 | 2015-19        | 2015-19 | 2019-22        | 2019-22 |
| big cities   | 0.027                  | 0.026 | 0.029 | 0.017 | 0.026 | 0.2%     | 32   | 12.4%          | 17      | -9.0%          | 14      |
| mountain     | 0.084                  | 0.047 | 0.054 | 0.047 | 0.049 | 0.3%     | 23   | 15.3%          | 19      | -10.0%         | 20      |
| rural        | 0.005                  | 0.004 | 0.005 | 0.003 | 0.005 | 0.1%     | 27   | 37.2%          | 5       | 2.4%           | 4       |
| small cities | 0.019                  | 0.013 | 0.016 | 0.011 | 0.016 | 0.2%     | 30   | 20.3%          | 7       | 2.5%           | 7       |

### Language zone

|                              | overnights in millions |       |       |       |       | ON share |      | ON development |         | ON development |         |
|------------------------------|------------------------|-------|-------|-------|-------|----------|------|----------------|---------|----------------|---------|
|                              | 2010                   | 2015  | 2019  | 2021  | 2022  | rank     |      | rank           |         | rank           |         |
|                              |                        |       |       |       |       | 2019     | 2019 | 2015-19        | 2015-19 | 2019-22        | 2019-22 |
| French speaking area         | 0.020                  | 0.018 | 0.020 | 0.014 | 0.018 | 0.2%     | 30   | 6.6%           | 23      | -10.0%         | 9       |
| German speaking area         | 0.101                  | 0.064 | 0.076 | 0.059 | 0.070 | 0.3%     | 28   | 18.5%          | 14      | -7.4%          | 16      |
| Italian speaking area        | 0.012                  | 0.006 | 0.007 | 0.005 | 0.007 | 0.3%     | 18   | 24.8%          | 11      | 0.1%           | 14      |
| Rhaeto Romanic language zone | 0.002                  | 0.001 | 0.001 | 0.001 | 0.001 | 0.1%     | 15   | -19.9%         | 25      | 7.4%           | 13      |

### Tourism region

|                             | overnights in millions |       |       |       |       | ON share |      | ON development |         | ON development |         |
|-----------------------------|------------------------|-------|-------|-------|-------|----------|------|----------------|---------|----------------|---------|
|                             | 2010                   | 2015  | 2019  | 2021  | 2022  | rank     |      | rank           |         | rank           |         |
|                             |                        |       |       |       |       | 2019     | 2019 | 2015-19        | 2015-19 | 2019-22        | 2019-22 |
| Graubünden                  | 0.028                  | 0.015 | 0.017 | 0.014 | 0.014 | 0.3%     | 20   | 11.3%          | 22      | -17.6%         | 24      |
| Bern Region                 | 0.024                  | 0.014 | 0.015 | 0.016 | 0.017 | 0.3%     | 25   | 11.1%          | 25      | 6.7%           | 11      |
| Zürich Region               | 0.013                  | 0.013 | 0.014 | 0.008 | 0.012 | 0.2%     | 32   | 9.3%           | 14      | -11.7%         | 18      |
| Wallis                      | 0.021                  | 0.013 | 0.013 | 0.010 | 0.012 | 0.3%     | 25   | 5.7%           | 26      | -9.8%          | 19      |
| Luzern / Vierwaldstättersee | 0.012                  | 0.007 | 0.011 | 0.009 | 0.011 | 0.3%     | 26   | 55.6%          | 3       | -1.3%          | 13      |
| Genf                        | 0.006                  | 0.007 | 0.008 | 0.004 | 0.007 | 0.2%     | 33   | 3.3%           | 26      | -12.4%         | 17      |
| Tessin                      | 0.012                  | 0.006 | 0.007 | 0.005 | 0.007 | 0.3%     | 18   | 23.2%          | 12      | -1.5%          | 14      |
| Waadt                       | 0.007                  | 0.006 | 0.007 | 0.006 | 0.007 | 0.2%     | 28   | 23.9%          | 11      | -7.0%          | 5       |
| Basel Region                | 0.005                  | 0.004 | 0.005 | 0.003 | 0.005 | 0.3%     | 27   | 23.5%          | 16      | 1.6%           | 6       |
| Ostschweiz                  | 0.003                  | 0.002 | 0.003 | 0.002 | 0.002 | 0.2%     | 23   | 42.5%          | 2       | -28.9%         | 24      |
| Aargau und Solothurn Region | 0.001                  | 0.001 | 0.002 | 0.001 | 0.002 | 0.1%     | 28   | 39.9%          | 7       | 11.6%          | 6       |
| Fribourg Region             | 0.001                  | 0.001 | 0.001 | 0.001 | 0.001 | 0.3%     | 22   | -0.7%          | 23      | -24.8%         | 10      |
| Jura & Drei-Seen-Land       | 0.001                  | 0.001 | 0.001 | 0.001 | 0.001 | 0.1%     | 28   | 12.7%          | 16      | -1.8%          | 7       |

Source: FSO/hotel statistics

Example: Tourists from Luxembourg generate the most overnight stays in Graubünden of any Swiss region, namely 0.017 million in 2019 (the table is sorted by the total number of 2019 overnight stays, thus Graubünden appears at the top of the list). From Graubünden's perspective, 0.3% of their total tourism volume comes from Luxembourg, making this source market the 20<sup>th</sup> most important market for this region (out of 33 ST markets overall). With a 11.3% development in overnight stays between 2015 and 2019, Luxembourg ranks 22<sup>nd</sup>. In other words, in reference to the development of overnight stays, 21 other source markets had a stronger performance and 11 had a weaker performance.

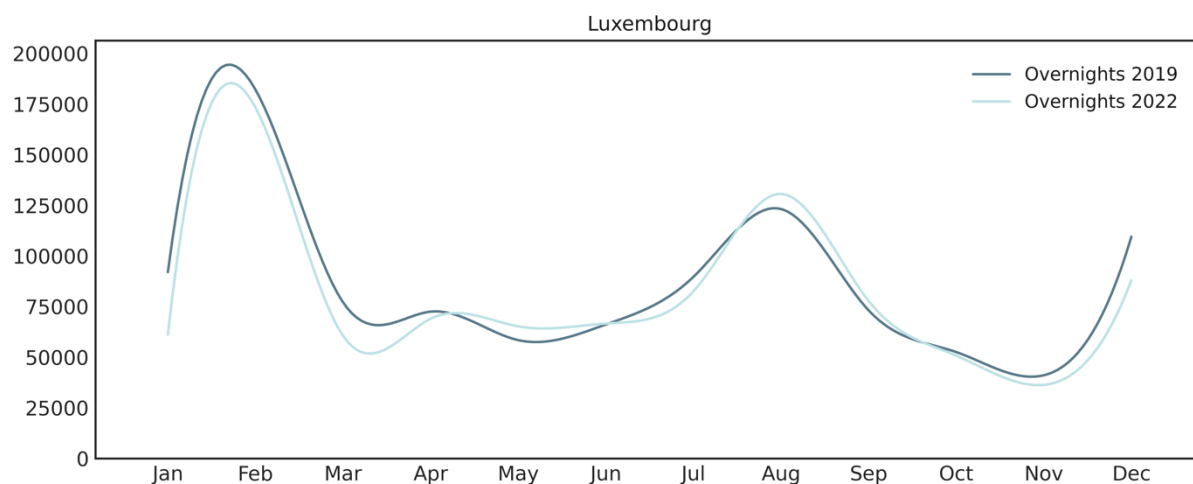
## Top 50 destinations

| destinations         | overnights in millions |       |       |       |       | ON share |      | ON development |         | ON development |         |         |
|----------------------|------------------------|-------|-------|-------|-------|----------|------|----------------|---------|----------------|---------|---------|
|                      | overnights             | 2010  | 2015  | 2019  | 2021  | 2022     | rank |                | rank    |                | rank    |         |
|                      |                        |       |       |       |       |          | 2019 | 2019           | 2015-19 | 2015-19        | 2019-22 | 2019-22 |
| Zürich               | 0.01                   | 0.009 | 0.01  | 0.006 | 0.009 | 0.3%     | 33   | 8.8%           | 21      | -16.0%         | 20      |         |
| Zermatt              | 0.008                  | 0.005 | 0.006 | 0.005 | 0.005 | 0.4%     | 24   | 14.2%          | 22      | -12.5%         | 23      |         |
| Genève               | 0.005                  | 0.006 | 0.006 | 0.003 | 0.005 | 0.3%     | 32   | -2.5%          | 28      | -9.9%          | 14      |         |
| Basel                | 0.004                  | 0.003 | 0.004 | 0.003 | 0.004 | 0.3%     | 28   | 24.7%          | 17      | 7.0%           | 6       |         |
| Davos                | 0.005                  | 0.002 | 0.003 | 0.002 | 0.002 | 0.4%     | 16   | 89.3%          | 6       | -46.0%         | 23      |         |
| Grindelwald          | 0.006                  | 0.003 | 0.003 | 0.005 | 0.004 | 0.5%     | 17   | 20.4%          | 21      | 25.8%          | 19      |         |
| Engelberg            | 0.002                  | 0.002 | 0.003 | 0.002 | 0.002 | 0.8%     | 14   | 58.6%          | 6       | -29.3%         | 21      |         |
| Lausanne             | 0.003                  | 0.002 | 0.003 | 0.002 | 0.003 | 0.3%     | 29   | 48.5%          | 12      | 4.4%           | 5       |         |
| Luzern               | 0.002                  | 0.002 | 0.003 | 0.002 | 0.002 | 0.2%     | 30   | 40.8%          | 4       | -8.6%          | 14      |         |
| Arosa                | 0.006                  | 0.003 | 0.002 | 0.002 | 0.002 | 0.6%     | 9    | -32.7%         | 29      | -17.9%         | 20      |         |
| Saas-Fee             | 0.004                  | 0.002 | 0.002 | 0.001 | 0.001 | 0.6%     | 15   | 16.0%          | 19      | -35.7%         | 15      |         |
| Lugano               | 0.003                  | 0.001 | 0.002 | 0.001 | 0.002 | 0.4%     | 23   | 35.2%          | 15      | 14.2%          | 9       |         |
| Adelboden            | 0.004                  | 0.002 | 0.002 | 0.001 | 0.001 | 0.9%     | 12   | 6.8%           | 22      | -45.6%         | 24      |         |
| Lauterbrunnen        | 0.003                  | 0.002 | 0.002 | 0.003 | 0.002 | 0.3%     | 21   | -3.6%          | 25      | -0.4%          | 16      |         |
| Pontresina           | 0.002                  | 0.001 | 0.002 | 0.001 | 0.001 | 0.6%     | 10   | 20.9%          | 12      | -34.7%         | 25      |         |
| Laax                 | 0.001                  | 0.001 | 0.002 | 0.002 | 0.001 | 0.9%     | 13   | 175.2%         | 8       | -9.9%          | 20      |         |
| Ascona               | 0.003                  | 0.002 | 0.002 | 0.001 | 0.002 | 0.4%     | 10   | -4.0%          | 29      | -1.2%          | 12      |         |
| Bern                 | 0.001                  | 0.001 | 0.002 | 0.001 | 0.001 | 0.2%     | 32   | 27.9%          | 13      | -15.1%         | 23      |         |
| St. Moritz           | 0.002                  | 0.001 | 0.001 | 0.002 | 0.002 | 0.2%     | 28   | 13.6%          | 21      | 5.3%           | 19      |         |
| Saanen               | 0.002                  | 0.002 | 0.001 | 0.001 | 0.001 | 0.4%     | 20   | -18.5%         | 30      | -11.4%         | 15      |         |
| Kandersteg           | 0.001                  | 0.001 | 0.001 | 0.001 | 0.001 | 1.0%     | 10   | 8.4%           | 21      | -10.2%         | 26      |         |
| Montreux             | 0.001                  | 0.001 | 0.001 | 0.001 | 0.001 | 0.2%     | 28   | -1.5%          | 28      | -4.1%          | 13      |         |
| Crans-Montana        | 0.002                  | 0.002 | 0.001 | 0.001 | 0.001 | 0.4%     | 15   | -37.7%         | 25      | 14.2%          | 13      |         |
| Films                | 0.001                  | 0.001 | 0.001 | 0.001 | 0.001 | 0.5%     | 13   | 56.6%          | 11      | -14.8%         | 21      |         |
| Interlaken           | 0.002                  | 0.001 | 0.001 | 0.001 | 0.001 | 0.1%     | 28   | -16.3%         | 30      | -63.1%         | 5       |         |
| Klosters-Serneus     | 0.002                  | 0     | 0.001 | 0.001 | 0.001 | 0.6%     | 10   | 66.7%          | 6       | -34.0%         | 21      |         |
| Vaz/Obervaz          | 0.002                  | 0.002 | 0.001 | 0.001 | 0.001 | 0.3%     | 10   | -65.8%         | 33      | 6.2%           | 14      |         |
| Sils im Engadin/Segl | 0.002                  | 0.001 | 0.001 | 0.001 | 0.001 | 0.4%     | 10   | 27.5%          | 16      | 9.5%           | 13      |         |
| Le Grand-Saconnex    | 0                      | 0.001 | 0.001 | 0     | 0     | 0.4%     | 29   | 51.7%          | 28      | -60.3%         | 29      |         |
| Weggis               | 0.001                  | 0     | 0.001 | 0.001 | 0.001 | 0.3%     | 24   | 77.4%          | 15      | -0.6%          | 15      |         |
| Fribourg             | 0                      | 0.001 | 0.001 | 0     | 0     | 0.5%     | 17   | -2.6%          | 22      | -56.6%         | 12      |         |
| Andermatt            | 0                      | 0     | 0.001 | 0.001 | 0.001 | 0.4%     | 19   | 98.8%          | 13      | 23.6%          | 19      |         |
| Locarno              | 0.001                  | 0     | 0.001 | 0     | 0.001 | 0.2%     | 16   | 72.5%          | 10      | -9.6%          | 8       |         |
| Opfikon              | 0.001                  | 0.001 | 0.001 | 0     | 0.001 | 0.1%     | 33   | -19.9%         | 20      | 8.6%           | 5       |         |
| Ormont-Dessus        | 0                      | 0     | 0.001 | 0     | 0     | 1.1%     | 9    | 55.0%          | 13      | -68.8%         | 21      |         |
| Val de Bagnes        | 0.001                  | 0     | 0.001 | 0.001 | 0.001 | 0.3%     | 24   | 51.2%          | 11      | -11.5%         | 22      |         |
| Lenk                 | 0.001                  | 0     | 0.001 | 0     | 0     | 0.5%     | 11   | 54.9%          | 11      | -16.5%         | 21      |         |
| Muralto              | 0.001                  | 0     | 0.001 | 0     | 0     | 0.6%     | 9    | 231.0%         | 1       | -62.7%         | 29      |         |
| Meyrin               | 0                      | 0     | 0.001 | 0     | 0     | 0.1%     | 32   | 12.6%          | 6       | -9.5%          | 24      |         |
| Bad Ragaz            | 0                      | 0     | 0.001 | 0     | 0     | 0.4%     | 15   | 87.1%          | 5       | -23.6%         | 23      |         |
| Beatenberg           | 0.001                  | 0     | 0.001 | 0     | 0.001 | 0.4%     | 15   | 116.5%         | 5       | 30.8%          | 17      |         |
| Stansstad            | 0                      | 0     | 0     | 0     | 0     | 0.4%     | 23   | 1387.1%        | 11      | -87.0%         | 11      |         |
| Zug                  | 0                      | 0     | 0     | 0     | 0     | 0.4%     | 26   | 49.5%          | 3       | -34.9%         | 25      |         |
| Kloten               | 0                      | 0     | 0     | 0     | 0     | 0.2%     | 31   | 9.1%           | 3       | -12.5%         | 31      |         |
| Brissago             | 0                      | 0     | 0     | 0     | 0     | 0.8%     | 7    | 203.8%         | 11      | -75.1%         | 27      |         |
| Paradiso             | 0.001                  | 0     | 0     | 0     | 0.001 | 0.2%     | 26   | -8.4%          | 20      | 40.6%          | 2       |         |
| St. Gallen           | 0                      | 0     | 0     | 0     | 0     | 0.2%     | 31   | 52.8%          | 11      | -28.1%         | 22      |         |
| Beckenried           | 0                      | 0     | 0     | 0     | 0.001 | 0.9%     | 10   | 27.9%          | 18      | 57.2%          | 9       |         |
| Fiesch               | 0                      | 0     | 0     | 0     | 0     | 0.8%     | 9    | 125.3%         | 6       | -16.3%         | 13      |         |
| Anniviers            | 0                      | 0     | 0     | 0     | 0     | 0.2%     | 13   | 25.9%          | 21      | -20.0%         | 18      |         |

Source: FSO/hotel statistics

How to read this table: see reading example on page 3.

## Seasonal distribution.



### Summer, winter

|                    | overnights in millions |       |       |       |       | ON share |      | ON development |      | ON development |      |
|--------------------|------------------------|-------|-------|-------|-------|----------|------|----------------|------|----------------|------|
|                    | 2010                   | 2015  | 2019  | 2021  | 2022  | 2019     | rank | 2015-19        | rank | 2019-22        | rank |
| summer (May-Oct)   | 0.056                  | 0.036 | 0.046 | 0.040 | 0.047 | 0.2%     | 30   | 29.3%          | 7    | 2.3%           | 9    |
| winter (Nov-April) | 0.078                  | 0.054 | 0.057 | 0.039 | 0.049 | 0.3%     | 26   | 7.2%           | 22   | -15.0%         | 11   |

### Summer core, winter core, off-season

|                              | overnights in millions |       |       |       |       | ON share |      | ON development |      | ON development |      |
|------------------------------|------------------------|-------|-------|-------|-------|----------|------|----------------|------|----------------|------|
|                              | 2010                   | 2015  | 2019  | 2021  | 2022  | 2019     | rank | 2015-19        | rank | 2019-22        | rank |
| off-season I (March-May)     | 0.027                  | 0.017 | 0.021 | 0.006 | 0.019 | 0.2%     | 31   | 23.2%          | 12   | -6.3%          | 7    |
| off-season II (Sept-Nov)     | 0.018                  | 0.013 | 0.017 | 0.016 | 0.017 | 0.2%     | 32   | 25.7%          | 8    | -1.1%          | 17   |
| summer core months (Jun-Aug) | 0.035                  | 0.022 | 0.028 | 0.027 | 0.028 | 0.2%     | 30   | 29.5%          | 6    | 0.3%           | 12   |
| winter core months (Dez-Feb) | 0.055                  | 0.038 | 0.038 | 0.030 | 0.032 | 0.4%     | 24   | 1.8%           | 23   | -16.0%         | 13   |

### Months

|           | overnights in millions |       |       |       |       | ON share |      | ON development |      | ON development |      |
|-----------|------------------------|-------|-------|-------|-------|----------|------|----------------|------|----------------|------|
|           | 2010                   | 2015  | 2019  | 2021  | 2022  | 2019     | rank | 2015-19        | rank | 2019-22        | rank |
| January   | 0.014                  | 0.010 | 0.009 | 0.002 | 0.006 | 0.3%     | 26   | -7.6%          | 26   | -33.6%         | 11   |
| February  | 0.027                  | 0.018 | 0.018 | 0.019 | 0.017 | 0.6%     | 17   | 0.9%           | 21   | -4.9%          | 5    |
| March     | 0.011                  | 0.007 | 0.008 | 0.004 | 0.006 | 0.2%     | 30   | 11.9%          | 15   | -21.4%         | 11   |
| April     | 0.008                  | 0.005 | 0.007 | 0.001 | 0.007 | 0.3%     | 29   | 32.6%          | 9    | -4.8%          | 7    |
| May       | 0.007                  | 0.005 | 0.006 | 0.001 | 0.007 | 0.2%     | 32   | 28.8%          | 10   | 11.7%          | 6    |
| June      | 0.007                  | 0.006 | 0.007 | 0.004 | 0.007 | 0.2%     | 32   | 11.0%          | 20   | 0.7%           | 8    |
| July      | 0.011                  | 0.007 | 0.009 | 0.008 | 0.008 | 0.2%     | 29   | 31.7%          | 10   | -7.9%          | 22   |
| August    | 0.017                  | 0.009 | 0.012 | 0.015 | 0.013 | 0.3%     | 24   | 40.3%          | 6    | 6.1%           | 12   |
| September | 0.009                  | 0.006 | 0.007 | 0.008 | 0.008 | 0.2%     | 30   | 22.3%          | 10   | 6.3%           | 14   |
| October   | 0.005                  | 0.004 | 0.005 | 0.005 | 0.005 | 0.2%     | 32   | 39.6%          | 8    | -3.3%          | 18   |
| November  | 0.004                  | 0.004 | 0.004 | 0.004 | 0.004 | 0.2%     | 32   | 16.8%          | 10   | -11.6%         | 26   |
| December  | 0.014                  | 0.010 | 0.011 | 0.009 | 0.009 | 0.4%     | 28   | 13.1%          | 21   | -19.6%         | 27   |

Source: FSO/hotel statistics

How to read these tables: see reading example on page 3.

## Structural facts of leisure travelers.

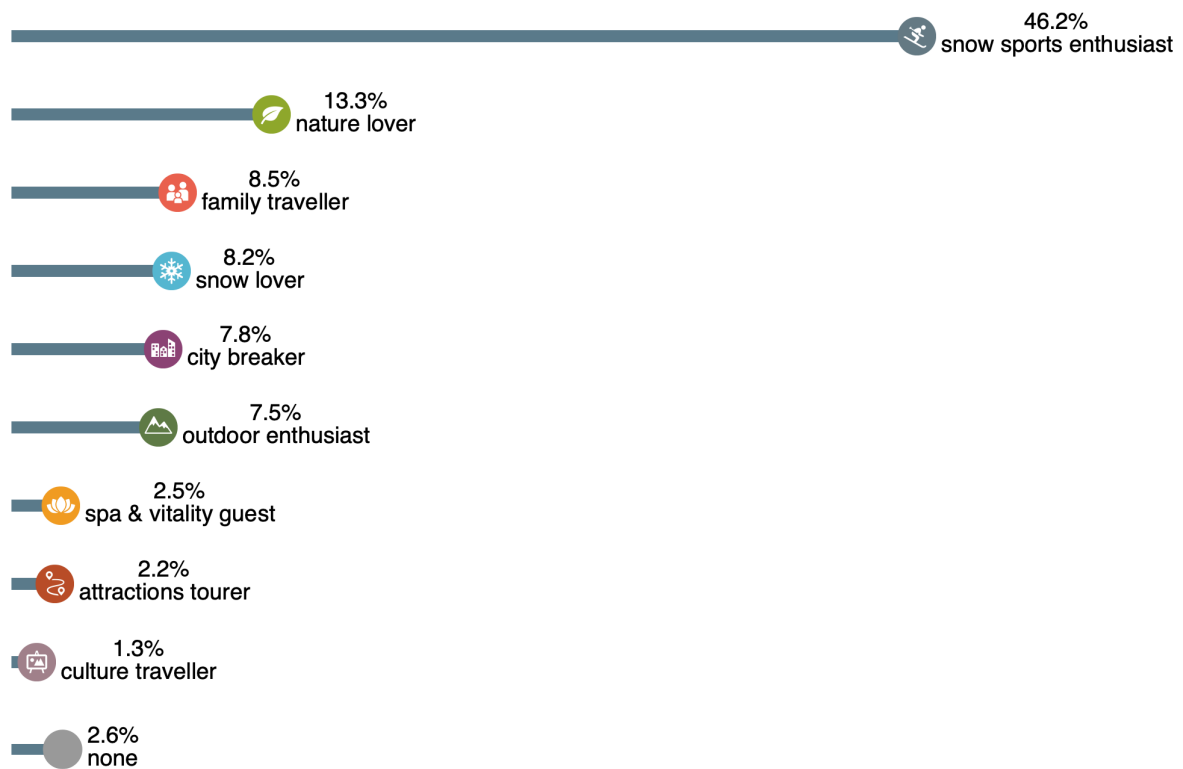
(leisure tourists in Swiss hotels & supplementary accommodations)

| age               | accommodation     | touring                    | through CH border |
|-------------------|-------------------|----------------------------|-------------------|
| 16-34 years 28.2% | hotel 35.8%       | no 72.5%                   | plane 9.3%        |
| 35-54 years 48.8% | suppl. acc. 64.2% | yes with 1 CH-Dest. 4.2%   | train 7.4%        |
| 55+ years 22.9%   |                   | yes with 2+ CH-Dest. 23.4% | other 83.3%       |

source: TMS 2017

## Guest segments.

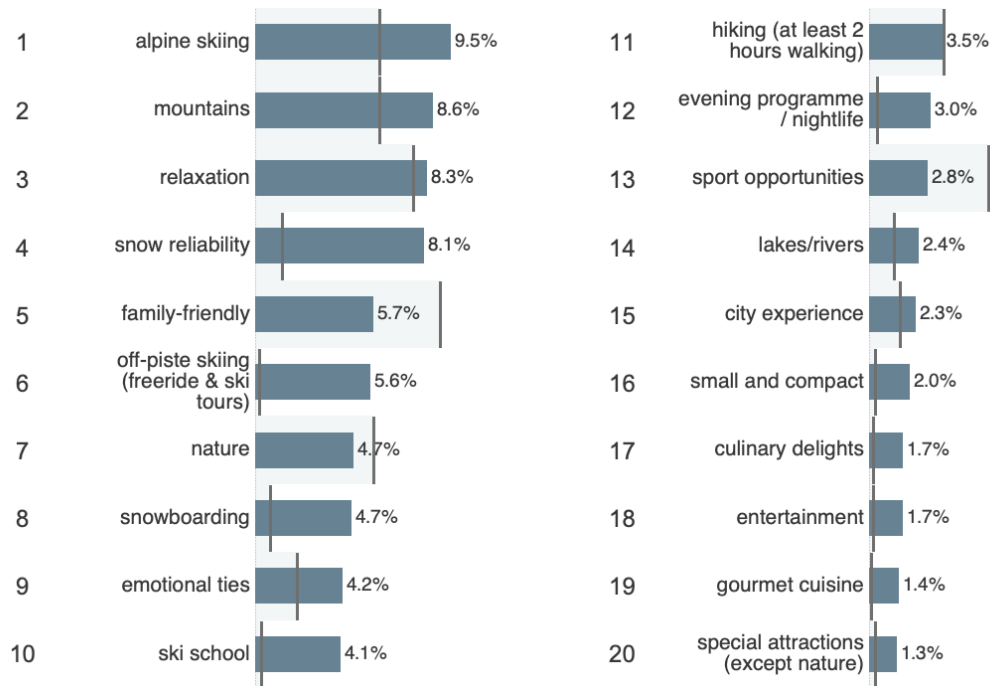
(leisure tourists in Swiss hotels & supplementary accommodations, single choice)



source: TMS 2017

## Main travel reasons for Switzerland travelers.

(leisure tourists in Swiss hotels & supplementary accommodations, single choice)

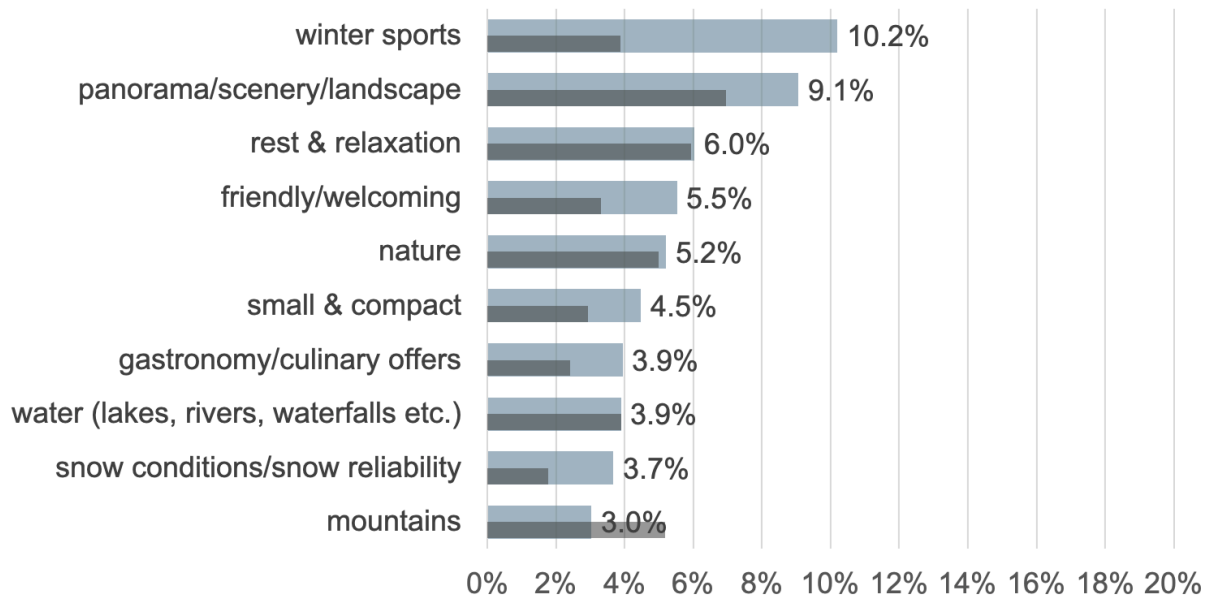


source: TMS 2017

■ = tourists from *considered* market  
 ■ = tourists from all markets (benchmark)

## Switzerland's tourism strengths.

(leisure tourists in Swiss hotels & supplementary accommodations, open answers)

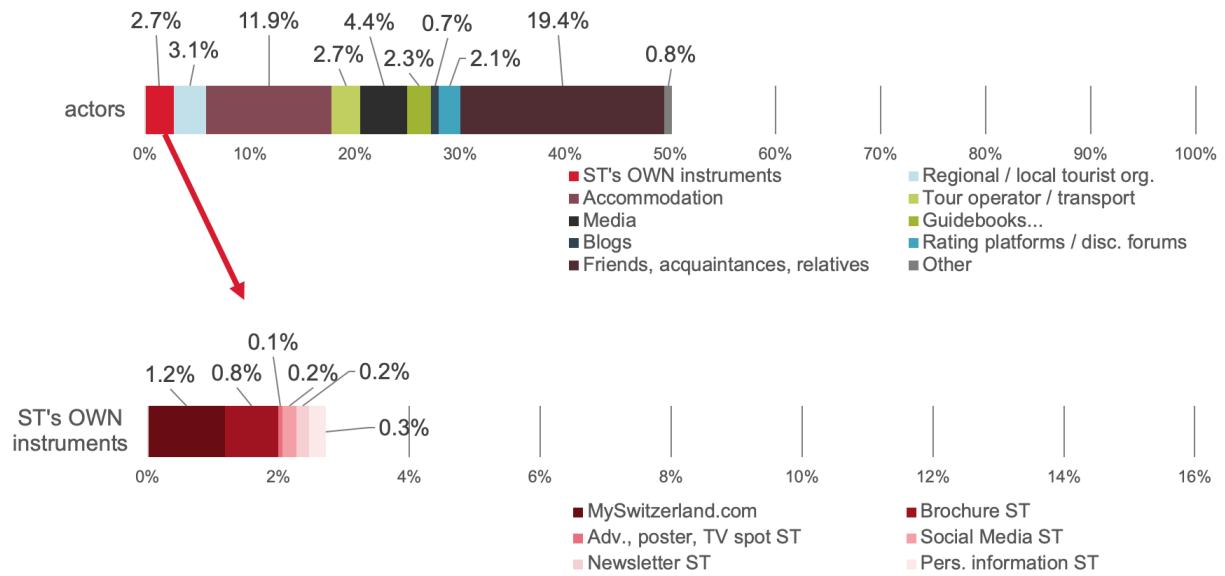


source: TMS 2017

■ = tourists from *considered* market  
 ■ = tourists from all markets (benchmark)

## External influence of tourists in their travel decisions.

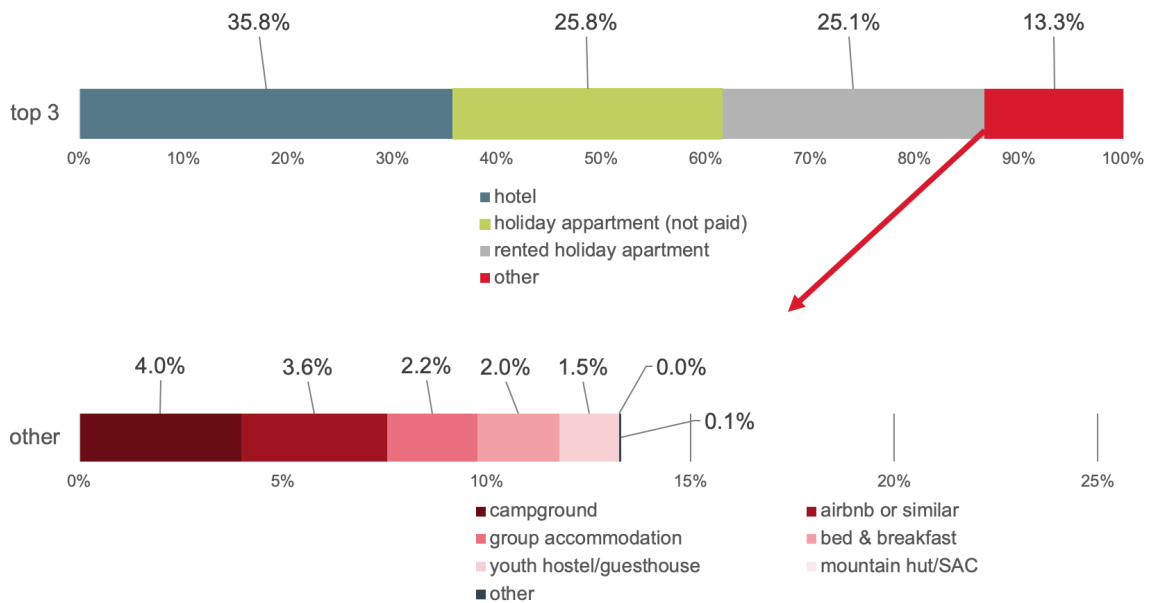
(leisure tourists in Swiss hotels & supplementary accommodations | degree of influence by sources of information)



The *total* ST influence (including ST contributions to instruments like media, tour operator...) is **14.2%**.  
source: TMS 2017

## Type of accommodation.

(leisure tourists in Swiss hotels & supplementary accommodations)



source: TMS 2017



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## Further sources.

localized annual planning  
market forecast  
Tourism Monitor Switzerland 2017

Appendix: affinity, share off-season, length of stay, \*\*\*\*/\*\*\*\*\* ON share.

Total

|       |      | share off season |      | length of stay |      | ****/***** ON share |      |
|-------|------|------------------|------|----------------|------|---------------------|------|
|       |      | rank             |      | rank           |      | rank                |      |
|       |      | 2019             | 2019 | 2019           | 2019 | 2019                | 2019 |
| total | n.a. | 36.1%            | 32   | 2.448          | 5    | 48.4%               | 12   |

Large vs. small destinations

|  |  | affinity |      | share off season |      | length of stay |      | ****/***** ON share |      |
|--|--|----------|------|------------------|------|----------------|------|---------------------|------|
|  |  | rank     |      | rank             |      | rank           |      | rank                |      |
|  |  | 2019     | 2019 | 2019             | 2019 | 2019           | 2019 | 2019                | 2019 |
| large destinations (top 10)            |  | 1.006    | 29   | 41.4%            | 30   | 2.118          | 19   | 60.0%               | 5    |
| mid-sized destinations (11-50)         |  | 1.261    | 2    | 28.6%            | 33   | 3.256          | 2    | 48.0%               | 15   |
| small destinations (51-200)            |  | 0.858    | 12   | 36.9%            | 32   | 2.314          | 9    | 41.0%               | 10   |
| very small destinations (201-smallest) |  | 0.658    | 11   | 43.6%            | 21   | 1.975          | 22   | 17.3%               | 15   |

Tourism zone

|              |  | affinity |      | share off season |      | length of stay |      | ****/***** ON share |      |
|--------------|--|----------|------|------------------|------|----------------|------|---------------------|------|
|              |  | rank     |      | rank             |      | rank           |      | rank                |      |
|              |  | 2019     | 2019 | 2019             | 2019 | 2019           | 2019 | 2019                | 2019 |
| big cities   |  | 0.914    | 28   | 48.4%            | 25   | 1.711          | 28   | 54.8%               | 12   |
| mountain     |  | 1.224    | 4    | 24.5%            | 33   | 3.601          | 3    | 45.7%               | 10   |
| rural        |  | 0.57     | 13   | 48.8%            | 14   | 1.731          | 27   | 28.4%               | 13   |
| small cities |  | 0.819    | 26   | 49.7%            | 17   | 2.066          | 11   | 52.5%               | 13   |

Language zone

|                              |  | affinity |      | share off season |      | length of stay |      | ****/***** ON share |      |
|------------------------------|--|----------|------|------------------|------|----------------|------|---------------------|------|
|                              |  | rank     |      | rank             |      | rank           |      | rank                |      |
|                              |  | 2019     | 2019 | 2019             | 2019 | 2019           | 2019 | 2019                | 2019 |
| French speaking area         |  | 0.911    | 21   | 44.4%            | 30   | 2.053          | 22   | 55.2%               | 8    |
| German speaking area         |  | 1.024    | 17   | 32.6%            | 32   | 2.555          | 5    | 47.4%               | 12   |
| Italian speaking area        |  | 1.159    | 3    | 52.9%            | 3    | 2.607          | 1    | 43.7%               | 12   |
| Rhaeto Romanic language zone |  | 0.444    | 7    | 11.0%            | 29   | 3.191          | 3    | 20.2%               | 5    |

Tourism region

|                             |  | affinity |      | share off season |      | length of stay |      | ****/***** ON share |      |
|-----------------------------|--|----------|------|------------------|------|----------------|------|---------------------|------|
|                             |  | rank     |      | rank             |      | rank           |      | rank                |      |
|                             |  | 2019     | 2019 | 2019             | 2019 | 2019           | 2019 | 2019                | 2019 |
| Graubünden                  |  | 1.219    | 5    | 17.2%            | 32   | 4.316          | 3    | 57.4%               | 7    |
| Bern Region                 |  | 1.089    | 15   | 27.5%            | 32   | 3.040          | 2    | 39.6%               | 13   |
| Zürich Region               |  | 0.813    | 28   | 47.2%            | 25   | 1.742          | 21   | 49.2%               | 16   |
| Wallis                      |  | 1.205    | 8    | 26.6%            | 30   | 4.073          | 3    | 46.1%               | 8    |
| Luzern / Vierwaldstättersee |  | 1.061    | 12   | 41.3%            | 28   | 2.121          | 8    | 37.4%               | 17   |
| Genf                        |  | 0.9      | 25   | 52.1%            | 18   | 1.729          | 32   | 68.6%               | 2    |
| Tessin                      |  | 1.196    | 3    | 52.9%            | 5    | 2.596          | 1    | 44.5%               | 12   |
| Waadt                       |  | 0.927    | 16   | 44.1%            | 31   | 2.180          | 18   | 55.2%               | 17   |
| Basel Region                |  | 1.019    | 17   | 43.3%            | 27   | 1.495          | 33   | 51.9%               | 10   |
| Ostschweiz                  |  | 0.638    | 9    | 37.3%            | 32   | 2.390          | 11   | 41.9%               | 12   |
| Aargau und Solothurn Region |  | 0.545    | 17   | 47.0%            | 25   | 1.468          | 31   | 29.1%               | 15   |
| Fribourg Region             |  | 0.967    | 7    | 42.2%            | 23   | 1.873          | 18   | 50.0%               | 8    |
| Jura & Drei-Seen-Land       |  | 0.492    | 18   | 50.7%            | 19   | 1.658          | 29   | 28.8%               | 25   |

Source: FSO/hotel statistics

How to read these tables: see reading example on page 11.

## Top 50 destinations

|                      | affinity |           | share off season |           | length of stay |           | ****/***** ON share |           |
|----------------------|----------|-----------|------------------|-----------|----------------|-----------|---------------------|-----------|
|                      | 2019     | rank 2019 | 2019             | rank 2019 | 2019           | rank 2019 | 2019                | rank 2019 |
| Zürich               | 1.064    | 27        | 48.1%            | 22        | 1.778          | 22        | 47.9%               | 17        |
| Zermatt              | 1.491    | 13        | 31.7%            | 28        | 4.760          | 2         | 72.0%               | 3         |
| Genève               | 0.962    | 23        | 51.6%            | 21        | 1.735          | 32        | 70.2%               | 2         |
| Basel                | 1.06     | 17        | 45.3%            | 26        | 1.491          | 33        | 55.0%               | 8         |
| Davos                | 1.457    | 4         | 14.2%            | 30        | 3.647          | 10        | 80.0%               | 8         |
| Grindelwald          | 2.025    | 6         | 21.1%            | 31        | 3.594          | 2         | 45.5%               | 10        |
| Engelberg            | 3.013    | 5         | 35.7%            | 19        | 3.074          | 6         | 22.3%               | 18        |
| Lausanne             | 0.971    | 20        | 50.2%            | 18        | 1.982          | 26        | 55.4%               | 23        |
| Luzern               | 0.692    | 22        | 49.3%            | 12        | 1.748          | 23        | 53.3%               | 8         |
| Arosa                | 2.137    | 2         | 21.7%            | 17        | 5.607          | 3         | 79.7%               | 6         |
| Saas-Fee             | 2.46     | 2         | 16.0%            | 29        | 4.836          | 13        | 35.6%               | 16        |
| Lugano               | 1.486    | 6         | 58.8%            | 2         | 2.361          | 2         | 48.1%               | 16        |
| Adelboden            | 3.533    | 1         | 18.0%            | 29        | 3.857          | 7         | 45.5%               | 24        |
| Lauterbrunnen        | 1.316    | 13        | 21.6%            | 28        | 3.665          | 5         | 29.6%               | 9         |
| Pontresina           | 2.202    | 1         | 17.2%            | 31        | 6.230          | 1         | 45.5%               | 12        |
| Laax                 | 3.256    | 4         | 6.9%             | 28        | 7.606          | 2         | 31.3%               | 4         |
| Ascona               | 1.527    | 3         | 48.1%            | 10        | 4.910          | 1         | 58.5%               | 8         |
| Bern                 | 0.746    | 28        | 49.0%            | 16        | 1.729          | 22        | 52.2%               | 12        |
| St. Moritz           | 0.751    | 20        | 16.5%            | 30        | 4.574          | 4         | 69.7%               | 5         |
| Saanen               | 1.334    | 4         | 24.3%            | 14        | 3.575          | 6         | 64.9%               | 24        |
| Kandersteg           | 3.885    | 2         | 11.6%            | 28        | 3.733          | 3         | 14.6%               | 9         |
| Montreux             | 0.761    | 22        | 48.1%            | 19        | 2.196          | 7         | 74.7%               | 13        |
| Crans-Montana        | 1.558    | 3         | 11.8%            | 31        | 4.744          | 6         | 23.0%               | 26        |
| Flims                | 1.8      | 1         | 19.5%            | 28        | 4.173          | 4         | 33.9%               | 24        |
| Interlaken           | 0.418    | 20        | 35.4%            | 29        | 3.357          | 1         | 25.0%               | 26        |
| Klosters-Serneus     | 2.117    | 3         | 18.2%            | 18        | 4.333          | 8         | 71.4%               | 5         |
| Vaz/Obervaz          | 1.134    | 2         | 6.4%             | 29        | 4.689          | 2         | 69.4%               | 6         |
| Sils im Engadin/Segl | 1.377    | 3         | 9.5%             | 28        | 6.355          | 2         | 54.7%               | 18        |
| Le Grand-Saconnex    | 1.341    | 17        | 41.8%            | 29        | 1.722          | 20        | 89.4%               | 2         |
| Weggis               | 1.238    | 6         | 38.7%            | 26        | 2.535          | 4         | 40.1%               | 8         |
| Fribourg             | 2.046    | 4         | 42.4%            | 26        | 2.024          | 15        | 76.4%               | 20        |
| Andermatt            | 1.602    | 4         | 22.9%            | 26        | 2.261          | 13        | 58.5%               | 22        |
| Locarno              | 0.805    | 4         | 51.2%            | 12        | 3.101          | 2         | 34.7%               | 8         |
| Opfikon              | 0.327    | 32        | 44.5%            | 27        | 1.380          | 23        | 62.3%               | 12        |
| Ormont-Dessus        | 4.357    | 1         | 15.6%            | 26        | 6.072          | 1         | 97.6%               | 1         |
| Val de Bagnes        | 1.267    | 11        | 34.4%            | 13        | 2.758          | 27        | 38.7%               | 18        |
| Lenk                 | 1.794    | 2         | 9.5%             | 24        | 5.377          | 1         | 17.5%               | 24        |
| Muralto              | 2.242    | 1         | 47.2%            | 18        | 4.422          | 1         | 82.7%               | 2         |
| Meyrin               | 0.485    | 31        | 58.5%            | 5         | 1.677          | 19        | 77.8%               | 7         |
| Bad Ragaz            | 1.405    | 3         | 32.8%            | 29        | 3.283          | 9         | 90.4%               | 7         |
| Beatenberg           | 1.412    | 4         | 42.6%            | 14        | 3.333          | 5         | 86.6%               | 4         |
| Stansstad            | 1.455    | 8         | 30.4%            | 27        | 2.067          | 13        | 89.2%               | 21        |
| Zug                  | 1.472    | 16        | 44.4%            | 30        | 2.809          | 12        | 55.8%               | 21        |
| Kloten               | 0.616    | 25        | 45.9%            | 26        | 1.201          | 33        | 76.6%               | 9         |
| Brissago             | 3.133    | 1         | 78.9%            | 5         | 5.378          | 1         | 0.0%                | 12        |
| Paradiso             | 0.788    | 17        | 48.0%            | 20        | 1.431          | 29        | 77.6%               | 8         |
| St. Gallen           | 0.606    | 18        | 50.5%            | 18        | 1.930          | 17        | 56.2%               | 9         |
| Beckenried           | 3.554    | 1         | 47.2%            | 23        | 1.847          | 13        | 9.1%                | 11        |
| Fiesch               | 2.97     | 2         | 31.2%            | 14        | 2.992          | 3         | 0.0%                | 0         |
| Anniviers            | 0.813    | 3         | 28.7%            | 13        | 4.107          | 2         | 37.1%               | 9         |

Source: FSO/hotel statistics

Example: In 2019, for tourists from Luxembourg who visited Zürich, the following further characteristics were noted:  
- 1.06 times higher share of overnight stays than they had in the whole of Switzerland (=rank 27 out of a total of 33 markets): ON-share Zürich (0.28%) vs. ON-share whole Switzerland (0.26%), see tables before.  
- the share of low season months (March-May, Sept-Nov) was 48.1% (=rank 22).  
- the length of stay (overnight stays/arrivals in the hotel) was 1.78 nights (=rank 22).  
- the share of 4- and 5-star hotels out of all hotel nights was 47.9% (=rank 17).

## Summer, winter

|                    | affinity |           | length of stay |           | ****/***** ON share |           |
|--------------------|----------|-----------|----------------|-----------|---------------------|-----------|
|                    | 2019     | rank 2019 | 2019           | rank 2019 | 2019                | rank 2019 |
| summer (May-Oct)   | 0.78     | 33        | 2.151          | 11        | 45.6%               | 13        |
| winter (Nov-April) | 1.295    | 1         | 2.755          | 4         | 50.7%               | 10        |

## Summer core, winter core, off-season

|                              | affinity |           | length of stay |           | ****/***** ON share |           |
|------------------------------|----------|-----------|----------------|-----------|---------------------|-----------|
|                              | 2019     | rank 2019 | 2019           | rank 2019 | 2019                | rank 2019 |
| off-season I (March-May)     | 0.878    | 30        | 2.208          | 14        | 50.2%               | 11        |
| off-season II (Sept-Nov)     | 0.719    | 32        | 2.015          | 20        | 46.1%               | 14        |
| summer core months (Jun-Aug) | 0.826    | 26        | 2.246          | 7         | 45.9%               | 13        |
| winter core months (Dez-Feb) | 1.662    | 1         | 3.130          | 2         | 50.3%               | 13        |

## Months

|           | affinity |           | length of stay |           | ****/***** ON share |           |
|-----------|----------|-----------|----------------|-----------|---------------------|-----------|
|           | 2019     | rank 2019 | 2019           | rank 2019 | 2019                | rank 2019 |
| January   | 1.238    | 5         | 2.843          | 4         | 52.3%               | 10        |
| February  | 2.231    | 1         | 3.561          | 1         | 49.5%               | 12        |
| March     | 0.877    | 20        | 2.443          | 12        | 52.8%               | 9         |
| April     | 1.033    | 19        | 2.266          | 7         | 51.0%               | 9         |
| May       | 0.741    | 31        | 1.906          | 22        | 45.6%               | 15        |
| June      | 0.664    | 33        | 2.078          | 11        | 47.6%               | 10        |
| July      | 0.748    | 27        | 2.241          | 6         | 44.8%               | 15        |
| August    | 1.043    | 13        | 2.351          | 7         | 45.8%               | 12        |
| September | 0.753    | 29        | 2.185          | 9         | 44.5%               | 14        |
| October   | 0.655    | 32        | 1.951          | 22        | 45.9%               | 12        |
| November  | 0.751    | 27        | 1.837          | 25        | 49.1%               | 11        |
| December  | 1.465    | 5         | 2.803          | 2         | 50.1%               | 14        |

Source: FSO/hotel statistics

How to read these tables: see reading example on page 11.