swi+zerland

Tourism Monitor Switzerland

2023

Grundsee, Lötschental, Valais ©Andreas Gerth

Sample description

Target group: «France_latest»

Definition:

- Source market (permanent residence): ST markets: "France"

Sample size: n=1048, very high result precision

Comparison group: «Total»

Definition:

- All tourists

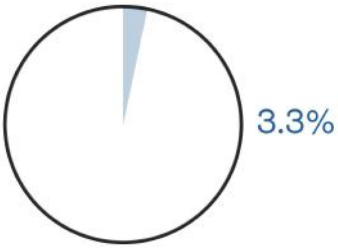
Sample size: n=22781, very high result precision

Report version 1.1.0 (2024-12-01).

Report Summary

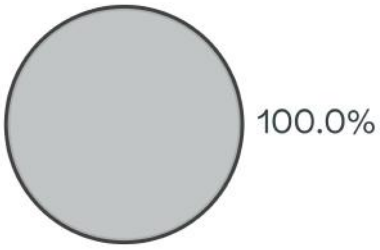
Market Share

Relevance: The target group «France_latest» accounts for approximately 3.3% of the Swiss overnight tourism market in the leisure sector.



France_latest

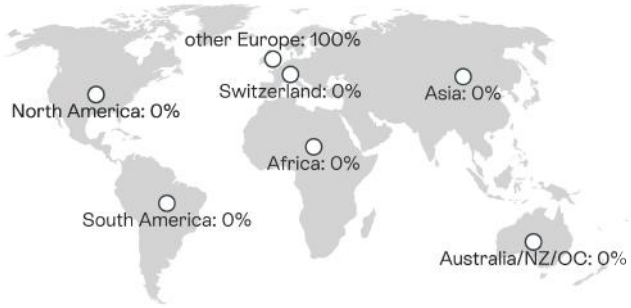
Relevance: The comparison group «Total» accounts for approximately 100.0% of the Swiss overnight tourism market in the leisure sector.



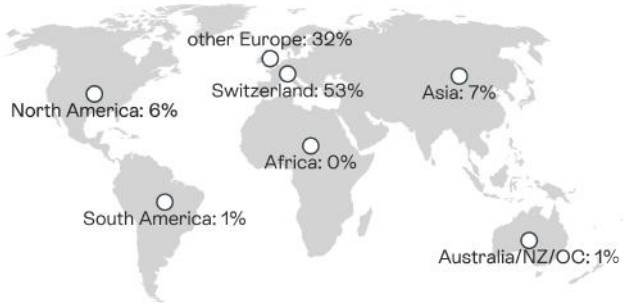
Total

Traveller Profiles and Preferences (general)

Origin of tourists: The global regions of origin are shown in the overview below:



France_latest | Total: 100%



Total | Total: 100%

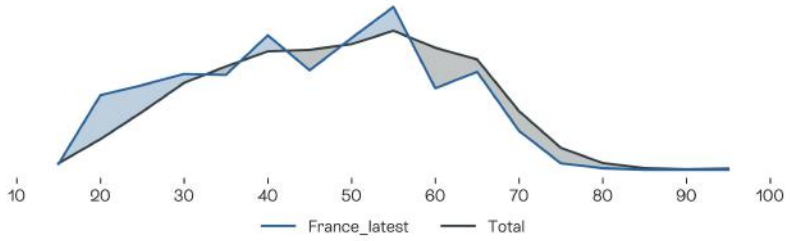
The target group is particularly over-represented in France (+97 percentage points relative to the comparison group).

France_latest
- France (100%)

Total
- Switzerland (53%)
- Germany (11%)
- United Kingdom (5%)
- United States of America (4%)
- BeNeLux (4%)

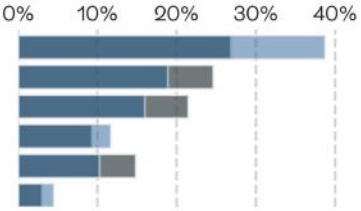
The place of residence was also recorded at the regional level within countries. 95% of the target group comes from these regions (out of a total of 812 world regions): Île-de-France (26%), Auvergne-Rhône-Alpes (22%), Grand Est (15%), Provence-Alpes-Côte d'Azur (8%), Occitania (6%), Nouvelle-Aquitaine (5%), Bourgogne-Franche-Comté (4%), Pays de la Loire (4%), Hauts-de-France (3%), Brittany (2%).

Age & gender: Tourists in the target group typically range from 30 to 55 years old (middle 50%), with an average age of 43. The group is predominantly female (52%). The comparison group lies between 35 and 58 years old, has an average age of 47 and a 50% male share. The target group is therefore younger (-4 years) and contains no relevant gender difference in comparison.



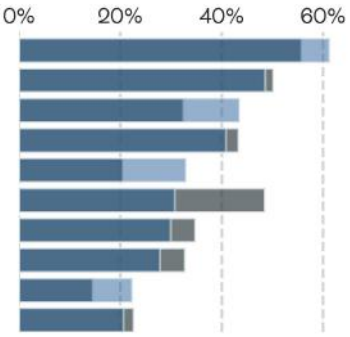
Personas: Tourists are assigned to the primary personas for both the target group (on the left) and the comparison group (on the right), but only for the summer season: Persona questions were not included in the TMS winter survey, as they were not available at the time. In a direct comparison between these groups, Kris - the local explorer (+12 percentage points relative to the comparison group) and Max - the highlight traveller (+3 pp.) are notably over-represented within the target group.

Personas	France_latest	Total
Kris - the local explorer	39%	27%
Lou - the downpacer	19%	25%
Jo - the active adventurer	16%	21%
Max - the highlight traveller	12%	9%
Pat - the bonding educator	10%	15%
Quinn - the pleasure seeker	4%	3%

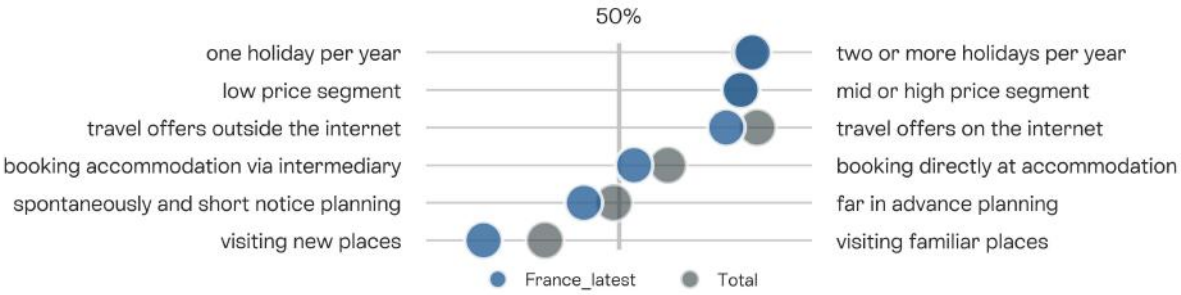


Activities: The next chart shows the top 10 sporting and non-sporting activities that the target group generally engages in during their holidays in Switzerland. Activities like museums & exhibitions (+13 percentage points), historical sights (+12 pp.), UNESCO sites/National Park (+7 pp.), walking (+5 pp.) and content creation spots for SoMe (+1 pp.) are particularly characteristic of tourists in the target group. Therefore, it can be beneficial to give them more emphasis in tourism marketing aimed at this audience.

Activities generally engaged in during holidays in Switzerland	France_latest	Total
walking	61%	56%
hiking (2+ hours)	49%	50%
historical sights	44%	32%
cuisine & gastronomy	41%	43%
museums & exhibitions	33%	20%
cable car/mountain railway	31%	48%
nature attractions	30%	35%
stay by lakes/rivers	28%	33%
UNESCO sites/National Park	22%	15%
shopping	21%	23%



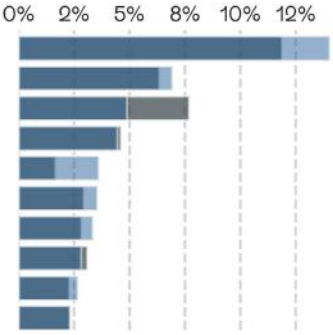
Travel habits (general): The TMS data reveals that 41% of the target group plan their trip well in advance, 54% book accommodation directly and 82% belong to the mid or high price travel segment (comparison group: 49%, 63%, and 82%, respectively). The following diagram also provides information on other key aspects of the general travel behaviour for both the target and comparison groups.



Sources of Information and Travel Decision

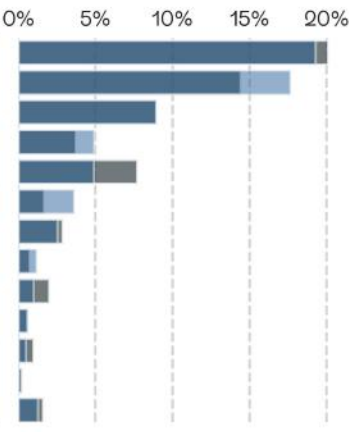
Sources of information: The TMS examines 74 sources of information regarding decision-making to have spent last vacation in Switzerland. The average overall external influence on target tourists is 66%, compared to 65% for the comparison group. This total influence can be detailed by individual information sources, as shown in the table below, which lists the 10 most important sources.

Information sources for choosing vacation in Switzerland: Degree of influence, top 10	France_latest	Total
people in the tourist's private circle: from person to person	14.0%	11.9%
internet site/app from local/ regional tourism organization	6.9%	6.3%
online ratings/booking platforms/discussion forums	4.9%	7.7%
internet site/app from national tourism organization "Switzerland Tourism"	4.4%	4.6%
travel guide	3.6%	1.7%
digital map	3.5%	2.9%
internet site/app from accommodation	3.3%	2.8%
people in the tourist's private circle on social media, video, image platform	2.8%	3.1%
blogger/influencer/famous person/celebrity (not personally known)	2.7%	2.3%
internet site/app from tour operator/travel provider/travel agent	2.3%	2.3%



By aggregating the 74 information sources into 13 broad *types*, tourism-related internet site/app has the strongest influence on the target group with a degree of influence of 19%. personal 1-to-1 communication (private or business) (+4 percentage points), travel guide (+4 pp.) and map (+1 pp.) are particularly characteristic for the target group.

Information sources for choosing vacation in Switzerland: aggregated to type. Degree of influence	France_latest	Total
tourism-related internet site/app	19.3%	20.1%
personal 1-to-1 communication (private or business)	17.6%	14.4%
social media/video/image platform (private or business)	8.9%	8.9%
map	4.9%	3.7%
online rating/booking platform/discussion forum	4.9%	7.7%
travel guide	3.6%	1.7%
catalogue/brochure/magazine	2.5%	2.9%
TV/radio/cinema	1.2%	0.7%
newspaper/magazine/news portal	1.0%	2.0%
event/fair	0.6%	0.5%
online newsletter	0.5%	1.0%
poster	0.2%	0.2%
other	1.3%	1.6%

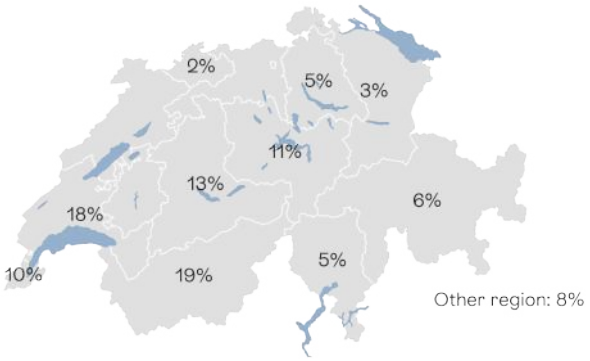


Days in advance for vacation decision and booking: Tourists in the target group typically decide to travel to Switzerland between 18 and 111 days before departure (middle 50%), with a median of 55 days. Following this, they book their trip or accommodation 6 to 73 days in advance, with a median of 28 days. They make their decision 10 days later and book 12 days later than the comparison group:

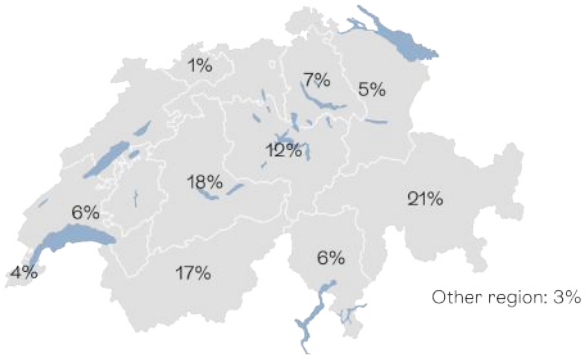
Destination vs. Accommodation: When asked about the most decisive factor when choosing accommodation, 68% of the target group selected 'destination more decisive', followed by 20% who chose 'accommodation more decisive' and 12% who chose 'destination and accommodation equally decisive'. For tourists in the target group, the destination is more important (+7 percentage points) than the accommodation as it is for the comparison group (61%).

Journey Characteristics

Tourism regions: All findings from the TMS are geographically and temporally linked to a specific holiday stay in Switzerland. This provides insight into the distribution of guests across the ten largest Swiss tourism regions: Tourists from the target group are most commonly found in Valais , Canton of Vaud and Bern Region They are mostly over-represented in Canton of Vaud (+12 percentage points), Geneva (+6 pp) and Jura & Three-Lakes (+4 pp).



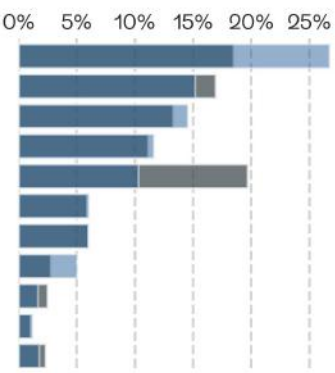
France_latest | Total: 100%



Total | Total: 100%

Type of holiday: A self-classification into 10 rough holiday types based on season, tourism zone, and/or needs shows that "sightseeing holidays" is the most dominant category within the target group, with a share of 27%. In terms of over-representation, "sightseeing holidays" (+9 percentage points), "cultural holidays" (+2 pp.) and "pleasure summer holidays (focused on rest, relaxation, and nature)" (+2 pp.) best characterizes the target group.

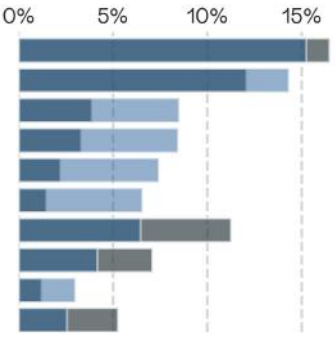
Type of holiday	France_latest	Total
sightseeing holidays	27%	18%
active summer holidays (focused on physical exercise/sports)	15%	17%
pleasure summer holidays (focused on rest, relaxation, and nature)	15%	13%
family holidays	12%	11%
active winter holidays (focused on physical exercise/sports)	10%	20%
city holidays	6%	6%
pleasure winter holidays (focused on rest, relaxation, and nature)	6%	6%
cultural holidays	5%	3%
spa and wellness holidays	2%	3%
luxury holidays	1%	1%
none of these	2%	2%



Travel Motivations

Travel Drivers: The table below highlights the key travel drivers for tourists from the target group when visiting Switzerland. They show a stronger preference for city experiences (+5 percentage points), lakes/rivers (+5 pp.), and round trip/road trip/touring (+6 pp.) than the comparison group.

Most important criterion when deciding to travel to Switzerland (travel driver): SINGLE CHOICE	France_latest	Total
mountains	15%	16%
nature	14%	12%
panorama	8%	4%
lakes/rivers	8%	3%
city experiences	7%	2%
round trip/road trip/touring	7%	1%
active holidays/sports	6%	11%
snow/glaciers	4%	7%
art & culture	3%	1%
good value for money	3%	5%

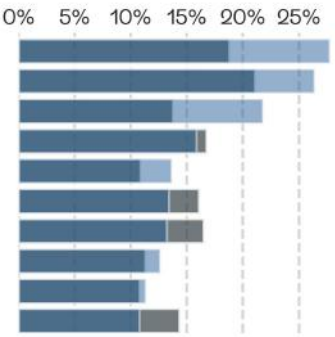


Destination Brand, Satisfaction and Customer Loyalty

Tourism strengths of destination: Tourists were asked to name the tourism strengths of the Swiss destination they visited, without any predefined answer categories. This approach yields entirely unbiased insights for strategic marketing and effective communication to our guests. The text responses (3'138 from the target group, 70'579 from the comparison group) were condensed into 34 dimensions, with the top 20 destination strengths highlighted in the overview below.

The *relative strengths* of the destinations visited by the target group are as follows: water (lakes, rivers, waterfalls) (+9 percentage points relative to the comparison group), rest/relaxation (+8 pp.), and panorama/scenery/landscape (+5 pp.).

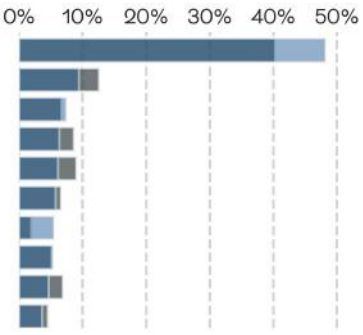
Touristic strengths	France_latest	Total
water (lakes, rivers, waterfalls)	28%	19%
panorama/scenery/landscape	26%	21%
rest/relaxation	22%	14%
mountains	16%	17%
beauty	14%	11%
gastronomy	13%	16%
nature	13%	17%
centrally located for day trips	13%	11%
friendliness/hospitality	11%	11%
public transportation	11%	14%



Tourism weaknesses of destination: Tourists were also asked to identify the weaknesses of the Swiss destination they visited, once again without any predefined answer options. The unbiased responses (1'050 from the target group, 23'672 from the comparison group) were categorized into 31 areas, with the 10 most frequently mentioned weaknesses summarized below.

The target group highlighted the following weaknesses in particular more often than the comparison group: expensive (+8 percentage points), not enough parking (+3 pp.), and not enough art/culture/museums (+1 pp.).

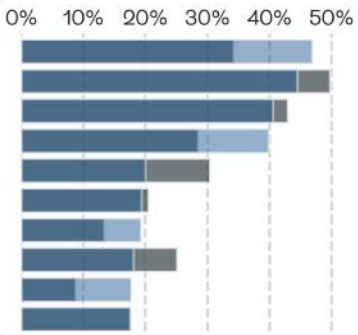
Touristic weaknesses	France_latest	Total
expensive	48%	40%
gastronomy/dining	9%	13%
does not offer enough/too small	7%	7%
too many tourists/too touristy	6%	9%
difficult to reach/remote	6%	9%
accommodation	6%	7%
not enough parking	5%	2%
not enough stores/shopping	5%	5%
public transportation	5%	7%
too much traffic	4%	5%



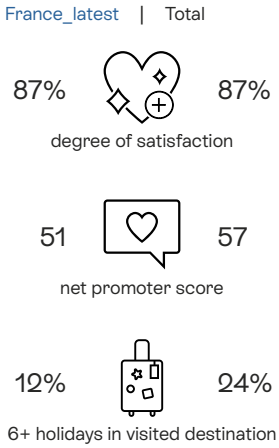
Brand image of destination: After gathering open-text responses on the destination's tourism strengths, the brand image of the visited destination was assessed using predefined categories, the same as those used for analyzing travel drivers. The top 10 image attributes are listed in the table below.

Relative to the comparison group, the destination visited by the target group stands out in these three areas: panorama (+13 percentage points), lakes/rivers (+11 pp.), and city experiences (+9 pp).

Brand image of visited destination	France_latest	Total
panorama	47%	34%
mountains	44%	50%
nature	41%	43%
lakes/rivers	40%	29%
active holidays/sports	20%	30%
good accessibility	19%	20%
safety at destination	19%	13%
good public transport (general)	18%	25%
city experiences	18%	9%
pleasant climate/weather	18%	18%

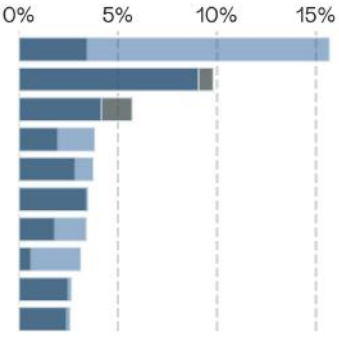


Destination performance metrics: The performance of the Swiss destinations visited by the target and the comparison group can be measured using the indicators 'satisfaction,' 'NPS', and 'share of regular visitors,' as shown in the overview below. The target group has the same level of satisfaction, a lower NPS (-6 points), and a smaller share of tourists with 6 or more visits to the destination (-12 pp.) than the comparison group.



Best alternative to destination visited in Switzerland: In response to the question "What other destination would you consider the best alternative to the one you visited in Switzerland?" participants could choose from a list of over 800 global regions. The table below presents the top 10 alternatives for the target group, including the results for the comparison group.

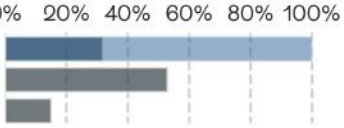
Best alternative to destination visited in Switzerland. (Top 10)	France_latest	Total
Auvergne-Rhône-Alpes	16%	3%
Tyrol	9%	10%
Valais	4%	6%
Lombardy	4%	2%
Provence-Alpes-Côte d'Azur	4%	3%
Tuscany	3%	3%
Vienna	3%	2%
Brussels	3%	1%
Salzburg	3%	2%
Bavaria	3%	2%



Detail

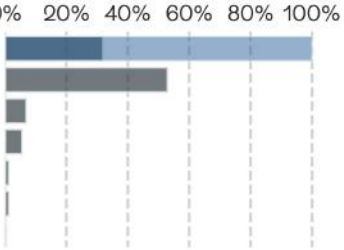
Traveller Profiles and Preferences (general)

Origin of tourists: Switzerland - other Europe - overseas	France_latest	Total
other Europe	100.0%↑↑↑	31.9%
Switzerland	0.0%	53.0%
overseas	0.0%	15.2%
n=	*1'048*	*22'781*

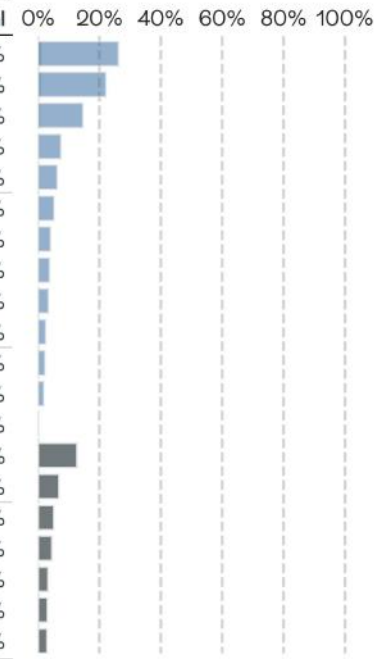


Source market (permanent residence): ST markets	France_latest	Total
France	100.0%↑↑↑	3.3%
Switzerland	0.0%	53.0%
Germany	0.0%	11.0%
United Kingdom	0.0%	4.5%
United States of America	0.0%	4.0%
BeNeLux	0.0%	3.6%
South East Asia (SI, TH, MY, ID)	0.0%	1.8%
Spain	0.0%	1.8%
Greater China	0.0%	1.7%
Italy	0.0%	1.6%
Australia NZ OC	0.0%	1.2%
Nordics (NO, SE, FI, DK)	0.0%	1.1%
India	0.0%	1.1%
Canada	0.0%	1.0%
Brazil	0.0%	0.7%
Austria	0.0%	0.7%
Poland	0.0%	0.6%
Portugal	0.0%	0.6%
Republic of Korea	0.0%	0.5%
Czech Republic	0.0%	0.5%
Gulf Countries (GCC)	0.0%	0.5%
Philippines	0.0%	0.3%
Japan	0.0%	0.2%
Other (non-ST market)	0.0%	4.4%
n=	*1'048*	*22'781*

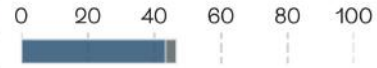
Source market (permanent residence): continent	France_latest	Total
other Europe	100.0%↑↑↑	31.9%
Switzerland	0.0%	53.0%
Asia	0.0%	6.9%
North America	0.0%	5.5%
Australia/NZ/OC	0.0%	1.2%
South America	0.0%	1.2%
Africa	0.0%	0.3%
n=	*1'048*	*22'781*



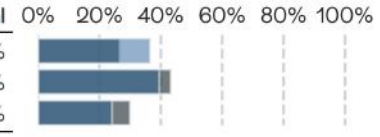
Your permanent residence. Region (Top 20):	France_latest	Total
Île-de-France	26.3%↑↑↑	0.9%
Auvergne-Rhône-Alpes	22.1%↑↑↑	0.8%
Grand Est	14.6%↑↑↑	0.5%
Provence-Alpes-Côte d'Azur	7.5%↑↑↑	0.3%
Occitania	6.2%↑↑↑	0.2%
Nouvelle-Aquitaine	5.2%↑↑↑	0.2%
Bourgogne-Franche-Comté	4.0%↑↑↑	0.1%
Pays de la Loire	3.8%↑↑↑	0.1%
Hauts-de-France	3.4%↑↑↑	0.1%
Brittany	2.5%↑↑↑	0.1%
Centre-Val de Loire	2.3%↑↑↑	0.1%
Normandy	1.9%	0.1%
Corsica	0.2%	0.0%
Zurich	0.0%	12.7%
Bern	0.0%	6.8%
Aargau	0.0%	5.0%
Vaud	0.0%	4.5%
Lucerne	0.0%	3.2%
Baden-Württemberg	0.0%	3.1%
St. Gallen	0.0%	2.9%
n=	*1'048*	*21'638*



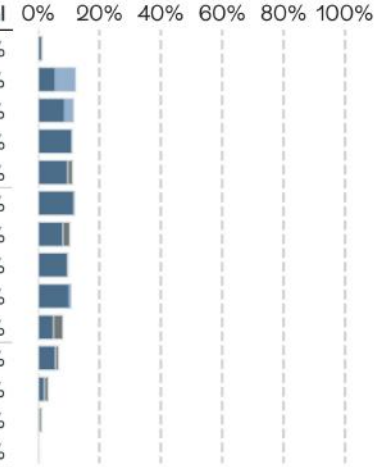
Age (mean)	France_latest	Total
mean	43.3	46.7
n=	*932*	*19'555*



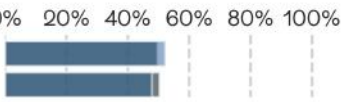
Age (3 categories)	France_latest	Total
16-35 years	36.5%↑	26.6%
36-55 years	39.5%	43.4%
56+ years	24.0%	30.0%
n=	*932*	*19'555*



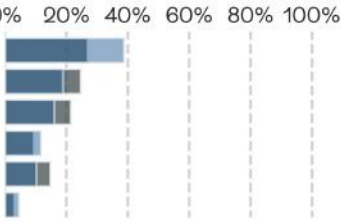
Age (14 categories)	France_latest	Total
16-20 years	1.2%	1.4%
21-25 years	12.3%↑↑↑	5.5%
26-30 years	11.7%↑	8.6%
31-35 years	11.3%	11.0%
36-40 years	9.7%	11.4%
41-45 years	12.1%	11.5%
46-50 years	8.0%	10.5%
51-55 years	9.7%	9.9%
56-60 years	10.9%	10.0%
61-65 years	5.0%↓↓	8.1%
66-70 years	5.6%	6.8%
71-75 years	2.1%	3.4%
76-80 years	0.3%	1.2%
81+ years	0.1%	0.5%
n=	*932*	*19'555*



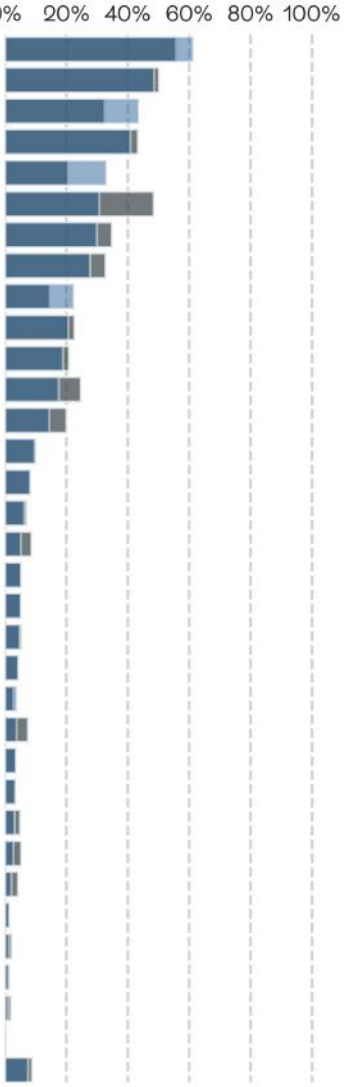
Gender	France_latest	Total
female	52.2%	49.7%
male	47.8%	50.3%
n=	*948*	*20'253*



Personas	France_latest	Total
Kris - the local explorer	38.7%↑	26.8%
Lou - the downpacer	18.9%	24.6%
Jo - the active adventurer	16.0%↓	21.5%
Max - the highlight traveller	11.7%	9.3%
Pat - the bonding educator	10.3%↓	14.8%
Quinn - the pleasure seeker	4.5%	3.0%
n=	*552*	*10'274*



Activities generally engaged in during holidays in Switzerland	France_latest	Total
walking	61.3%	55.7%
hiking (2+ hours)	48.5%	50.1%
historical sights	43.5%↑	32.4%
cuisine & gastronomy	40.8%	43.3%
museums & exhibitions	32.9%↑↑	20.5%
cable car/mountain railway	30.7%↓↓	48.5%
nature attractions	29.9%	34.8%
stay by lakes/rivers	27.8%	32.7%
UNESCO sites/National Park	22.4%↑↑	14.5%
shopping	20.6%	22.6%
wellness & spa	18.9%	20.8%
alpine skiing	17.5%↓	24.6%
boat excursion	14.4%↓	19.9%
local events	10.0%	9.6%
nightlife	8.3%	8.0%
jogging	6.2%	7.0%
mountain biking	5.1%↓↓	8.6%
snowshoeing	5.1%	5.3%
riding a touring bike	5.1%	5.0%
christmas markets	4.7%	5.4%
long-distance hiking (2+days)	4.3%	4.2%
content creation spots for SoMe	3.8%	2.6%
tobogganing	3.8%↓↓	7.5%
stand-up paddling	3.5%	3.5%
off-piste skiing	3.4%	3.2%
snowboarding	3.1%	4.9%
cross-country skiing	2.8%↓↓	5.2%
local activities	2.1%↓↓↓	4.2%
gravel biking	1.3%	1.2%
paragliding	1.2%	2.1%
golf	1.1%	1.4%
roadcycling	1.0%	1.9%
training camps	0.3%	0.3%
other	7.5%	8.9%
n=	*1'048*	*22'781*



Travel habits: spontaneously vs. far in advance	France_latest	Total
spontaneously and short notice planning	59.1%	51.3%
far in advance planning	40.9%	48.7%
n=	*954*	*20'474*

Travel habits: information via internet	France_latest	Total
travel offers on the internet	77.8%	85.9%
travel offers outside the internet	22.2%↑↑	14.1%
n=	*954*	*20'474*

Travel habits: directly vs. not directly	France_latest	Total
booking directly at accommodation	46.3%	56.3%
booking accommodation via intermediary	39.5%	33.4%
unpaid accommodation (own accommodation, with family/friends)	14.2%↑	10.3%
n=	*953*	*20'472*

Travel habits: familiar vs. new places	France_latest	Total
visiting new places	85.1%	69.1%
visiting familiar places	14.9%↓↓↓	30.9%
n=	*954*	*20'479*

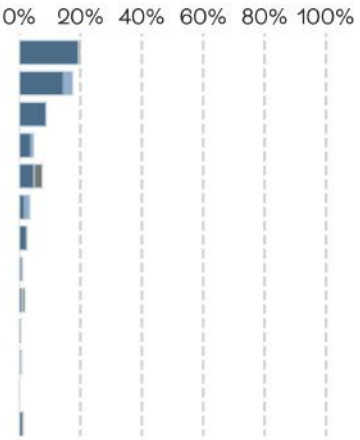
Travel habits: price segment	France_latest	Total
low price segment	18.4%	18.2%
mid price segment	71.4%	71.4%
high price segment	10.2%	10.4%
n=	*954*	*20'475*

Travel habits: number of holidays per year	France_latest	Total
two to three holidays per year	59.1%	61.3%
four or more holidays per year	25.6%	22.7%
one holiday per year	15.3%	16.0%
n=	*954*	*20'476*

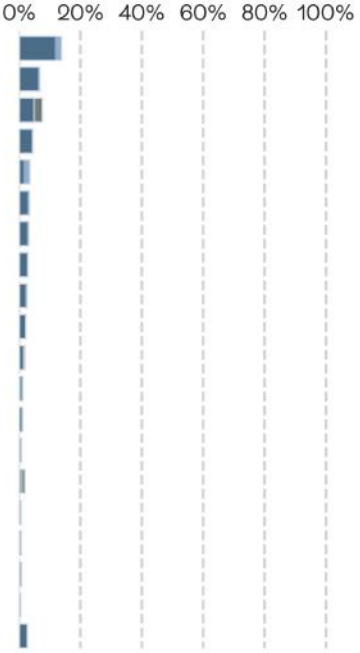
Travel habits: socializing	France_latest	Total
no need for making new contacts during holiday	59.7%	71.0%
enjoy making new contacts during holiday	40.3%↑	29.0%
n=	*953*	*20'477*

Sources of Information and Travel Decision

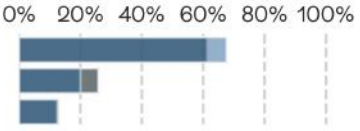
Information sources for choosing vacation in Switzerland: aggregated to type. Degree of influence	France_latest	Total
tourism-related internet site/app	19.3%	20.1%
personal 1-to-1 communication (private or business)	17.6%	14.4%
social media/video/image platform (private or business)	8.9%	8.9%
map	4.9%	3.7%
online rating/booking platform/discussion forum	4.9%↓↓	7.7%
travel guide	3.6%	1.7%
catalogue/brochure/magazine	2.5%	2.9%
TV/radio/cinema	1.2%	0.7%
newspaper/magazine/news portal	1.0%	2.0%
event/fair	0.6%	0.5%
online newsletter	0.5%	1.0%
poster	0.2%	0.2%
other	1.3%	1.6%
n=	*816*	*17'505*



Information sources for choosing vacation in Switzerland: Degree of influence, top 20 out of a total of 74	France_latest	Total
people in the tourist's private circle: from person to person	14.0%	11.9%
internet site/app from local/ regional tourism organization	6.9%	6.3%
online ratings/booking platforms/discussion forums	4.9%↓↓	7.7%
internet site/app from national tourism organization "Switzerland Tourism"	4.4%	4.6%
travel guide	3.6%	1.7%
digital map	3.5%	2.9%
internet site/app from accommodation	3.3%	2.8%
people in the tourist's private circle on social media, video, image platform	2.8%	3.1%
blogger/influencer/famous person/celebrity (not personally known)	2.7%	2.3%
internet site/app from tour operator/travel provider/travel agent	2.3%	2.3%
internet site/app from local provider of excursions/activities/attractions	1.5%	2.0%
printed map	1.4%	0.8%
national tourism organization "Switzerland Tourism" on social media/video/image platform	1.2%	1.1%
personal information from local/regional tourism organization	0.8%	0.4%
internet site/app from transport companies (only arrival and departure)	0.8%	2.0%
personal information directly from local provider of excursions/activities/attractions	0.8%	0.5%
catalogues/brochures/magazines from local/regional tourism organization	0.8%	0.6%
local/regional tourism organization on social media/video/image platform	0.7%	0.8%
tour operator/travel provider/travel agent on social media/video/image platform	0.6%	0.3%
other	2.8%	2.6%
n=	*816*	*17'505*

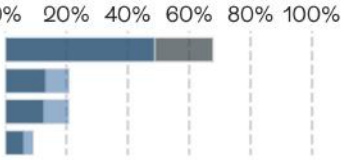


Decisive factor when choosing an accommodation	France_latest	Total
destination more decisive	67.5%	61.3%
accommodation more decisive	20.0%	25.8%
destination and accommodation equally decisive	12.5%	12.9%
n=	*1'048*	*22'781*

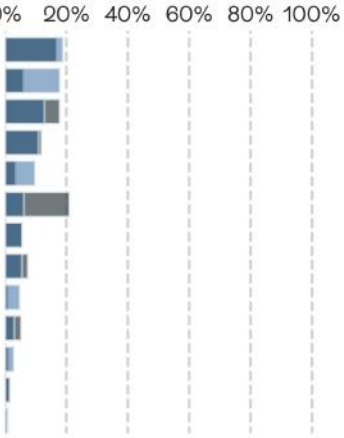


Journey Characteristics

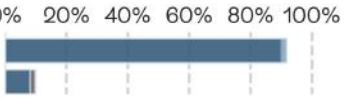
Location of holiday: tourism zone	France_latest	Total
mountain	48.7%↓	67.8%
small town	21.1%↑↑	13.3%
big city	20.9%↑↑	12.7%
countryside	9.3%↑↑	6.1%
n=	*976*	*21'146*



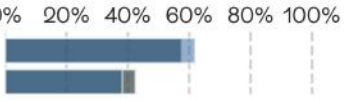
Location of holiday: tourism region	France_latest	Total
Valais	18.8%	16.8%
Canton of Vaud	17.8%↑↑↑	6.1%
Bern Region	12.9%↓	17.8%
Lucerne - Lake Lucerne Region	10.9%	11.9%
Geneva	9.8%↑↑↑	3.5%
Graubünden	6.1%↓↓↓	21.1%
Ticino	5.5%	5.6%
Zurich Region	5.4%↓	7.5%
Jura & Three-Lakes	4.7%↑↑↑	1.0%
Eastern Switzerland	3.0%↓↓	5.2%
Region of Fribourg	2.9%	1.1%
Basel Region	1.6%	1.4%
Aargau - Solothurn Region	0.6%	1.0%
n=	*976*	*21'150*



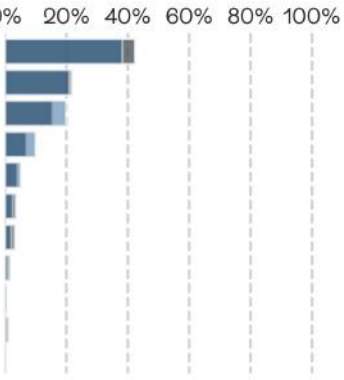
Package tour: bundling of travel to and from the destination, accommodation and/or other tourist services at the destination	France_latest	Total
no package tour	91.8%	90.0%
package tour	8.2%	10.0%
n=	*1'048*	*22'781*



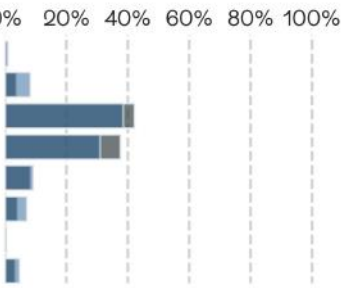
Season: 2 categories	France_latest	Total
summer (May-October)	61.9%	57.5%
winter (November-April)	38.1%	42.5%
n=	*1'043*	*22'618*



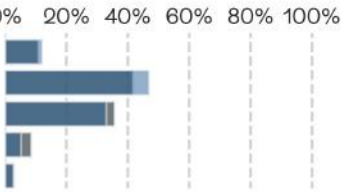
Accommodation	France_latest	Total
hotel/health establishment	38.2%	42.3%
rented apartment/house	20.9%	21.7%
unpaid apartment/house	19.8%	15.4%
campsite	9.9%↑	6.9%
serviced apart./chalets/villas	5.0%	4.0%
bed & breakfast	2.4%	3.5%
youth hostel/hostel	2.0%	3.2%
group accommodation	0.9%	1.6%
agritourism (on a farm)	0.4%	0.3%
mountain hut/SAC	0.2%	1.0%
other	0.2%	0.2%
n=	*942*	*20'133*



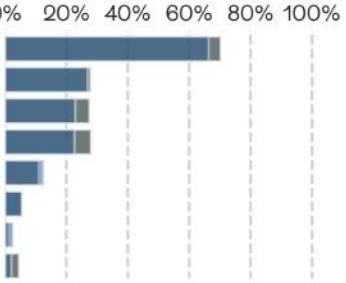
Star category of hotel / health establishment	France_latest	Total
*	1.0%	0.4%
**	8.3%↑↑↑	3.8%
***	38.4%	42.1%
****	30.9%	37.6%
*****	9.2%	8.4%
no category	7.1%↑↑	4.1%
different classification	0.5%	0.2%
not known	4.7%	3.4%
n=	*325*	*8'025*



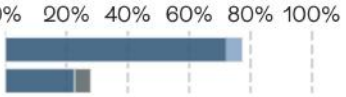
Size of travel group	France_latest	Total
1 person	12.1%	10.9%
2 persons	47.0%	41.7%
3-5 persons	33.0%	35.7%
6-9 persons	5.2%↓↓	8.6%
10+ persons	2.8%	3.1%
n=	*1'027*	*21'702*



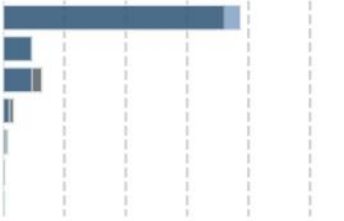
Travel community	France_latest	Total
with partner	66.3%	70.3%
with friends/acquaintances	26.8%	27.8%
with other family members (including children with age 18+)	22.9%	27.5%
with children (below 18 years)	22.7%	27.9%
alone	12.6%	10.9%
with dog	5.4%	5.5%
with other pet	2.6%	1.2%
in a group that includes people I don't know	2.0%↓↓↓	4.5%
n=	*1'048*	*22'781*



Travelling with children (<18 years)	France_latest	Total
no	77.3%	72.1%
yes	22.7%	27.9%
n=	*1'048*	*22'781*

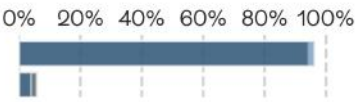


Number of children travelling with (<18 years)	France_latest	Total
no child	77.3%	72.1%
1 child	9.5%	9.2%
2 children	9.4%↓	12.7%
3 children	2.1%	3.5%
4 children	0.7%	1.6%
5 children	0.6%	0.5%
6+ children	0.3%	0.5%
n=	*1'048*	*22'781*

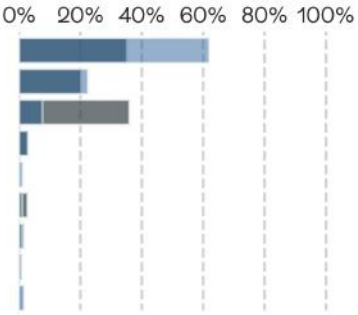


Travelling with children (age)	France_latest	Total
Travelling with children (0-5 years)	7.7%↓↓	11.9%
Travelling with children (6-12 years)	12.1%↓	17.0%
Travelling with children (13-17 years)	10.1%	8.9%
n=	*1'048*	*22'781*

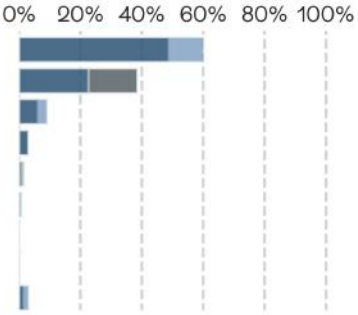
Multi-generation travel	France_latest	Total
no	96.2%	94.2%
yes	3.8%	5.8%
n=	*1'048*	*22'781*



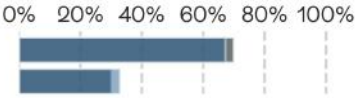
Means of transport crossing the Swiss border	France_latest	Total
car	61.8%↑↑	35.1%
train	22.4%	20.2%
plane	7.6%↓↓↓	35.9%
camper van / caravan	2.8%	2.9%
motorcycle	1.1%	0.2%
private coach for an extra trip (e.g. for group travel)	1.0%	2.7%
long-distance bus through Europe (regular scheduled service)	1.0%	1.5%
tram / public bus	0.7%	0.7%
other	1.6%	0.7%
n=	*1'043*	*13'476*



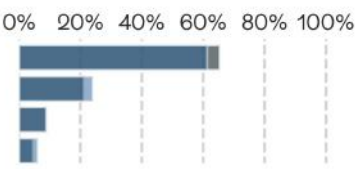
Main means of transport within Switzerland	France_latest	Total
car	60.1%	48.7%
train	22.6%↓↓	38.5%
tram / public bus	9.1%↑	6.1%
camper van / caravan	3.1%	3.0%
private coach for an extra trip (e.g. for group travel)	0.9%	1.6%
motorcycle	0.8%	0.3%
plane	0.1%	0.1%
long-distance bus through Europe (regular scheduled service)	0.1%	0.2%
other	3.1%	1.5%
n=	*1'022*	*22'438*



Touring within Switzerland	France_latest	Total
non-touring (1 destination)	67.2%	69.9%
touring (2+ destinations)	32.8%	30.1%
n=	*1'048*	*22'781*

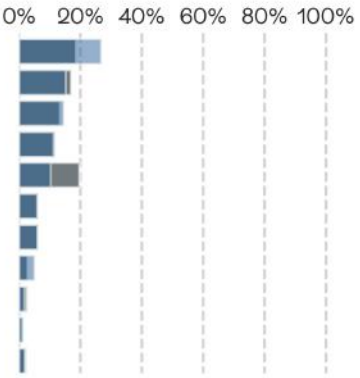


Touring within Switzerland and/or Europe	France_latest	Total
no: 1 CH destination	61.2%	65.4%
yes: multiple CH destinations	24.0%	21.2%
yes: multiple CH destination & destination(s) abroad	8.8%	8.9%
yes: 1 CH destination & destination(s) abroad	6.0%	4.5%
n=	*1'048*	*22'781*

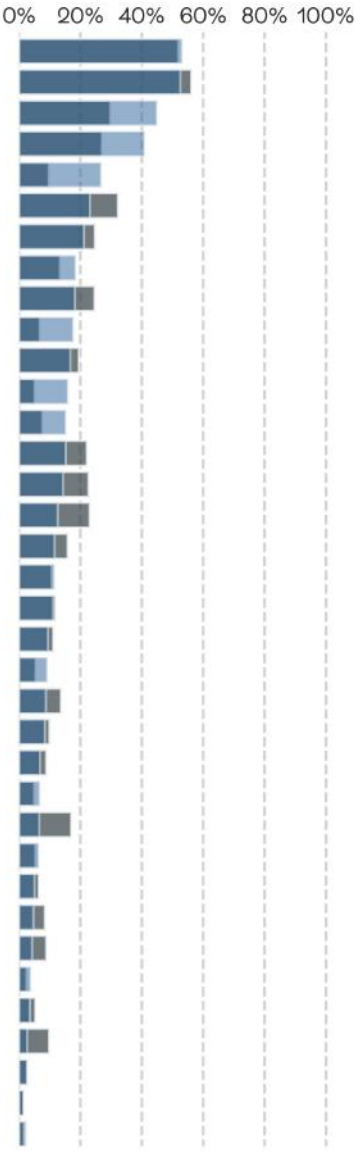


Travel Motivations

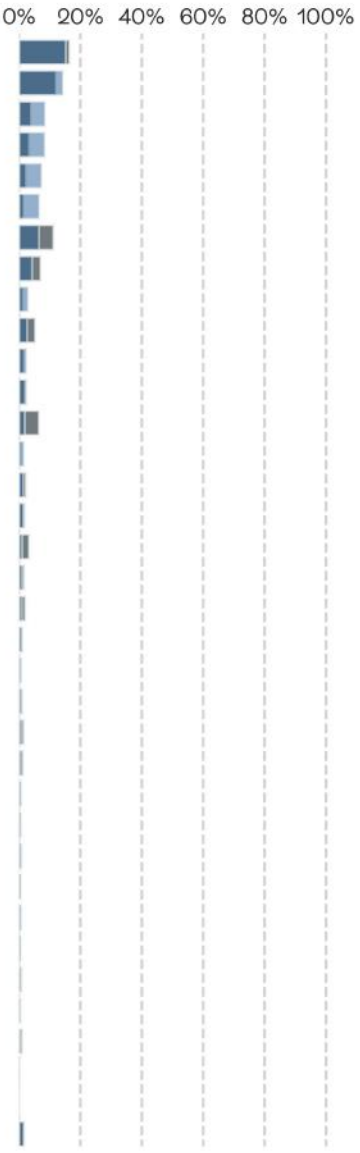
Type of holiday	France_latest	Total
sightseeing holidays	26.7%↑	18.5%
active summer holidays (focused on physical exercise/sports)	15.2%	17.0%
pleasure summer holidays (focused on rest, relaxation, and nature)	14.5%	13.3%
family holidays	11.6%	11.1%
active winter holidays (focused on physical exercise/sports)	10.3%↓↓	19.7%
city holidays	6.0%	5.8%
pleasure winter holidays (focused on rest, relaxation, and nature)	6.0%	6.0%
cultural holidays	5.0%↑↑	2.8%
spa and wellness holidays	1.6%	2.5%
luxury holidays	1.2%	1.0%
none of these	1.8%	2.3%
n=	*1'048*	*22'781*



Most important criteria when deciding to travel to Switzerland (travel drivers): MULTIPLE CHOICE	France_latest	Total
nature	53.1%	51.8%
mountains	52.5%	56.0%
lakes/rivers	44.9%↑↑	29.7%
panorama	40.8%↑↑	26.9%
city experiences	26.7%↑↑↑	9.6%
active holidays/sports	23.0%↓	32.2%
good catering/food	21.1%	24.7%
safety at destination	18.4%↑	13.3%
snow/glaciers	18.2%↓	24.5%
authenticity	17.7%↑↑↑	6.6%
pleasant climate/weather	16.7%	19.4%
round trip/road trip/touring	15.9%↑↑↑	5.0%
art & culture	15.2%↑↑	7.7%
hospitality	15.2%↓	22.0%
good value for money	14.3%↓↓	22.7%
good public transport (general)	12.6%↓↓	23.0%
good accessibility	11.6%↓	15.8%
short distances for experiences	11.5%	10.5%
high quality standards	11.1%	11.8%
reliable service at destination	9.4%	11.1%
traditions	9.2%↑↑	5.3%
atmosphere	8.7%↓↓	13.7%
high variety of experiences	8.4%	9.9%
adventure	6.9%	8.8%
historical experiences	6.7%	4.9%
family-friendliness	6.6%↓↓↓	17.0%
mountain pass roads	6.4%	5.2%
entertainment/fun	5.0%	6.3%
maximum relaxation	4.6%↓↓	8.4%
sustainability	4.2%↓↓↓	8.9%
luxury	3.7%	2.3%
exceptional accommodation	3.6%	5.2%
convenient travel options	2.6%↓↓↓	9.8%
shopping	2.6%	2.5%
evening programme/nightlife	1.3%	1.4%
other	1.6%	2.3%
n=	*1'048*	*22'776*

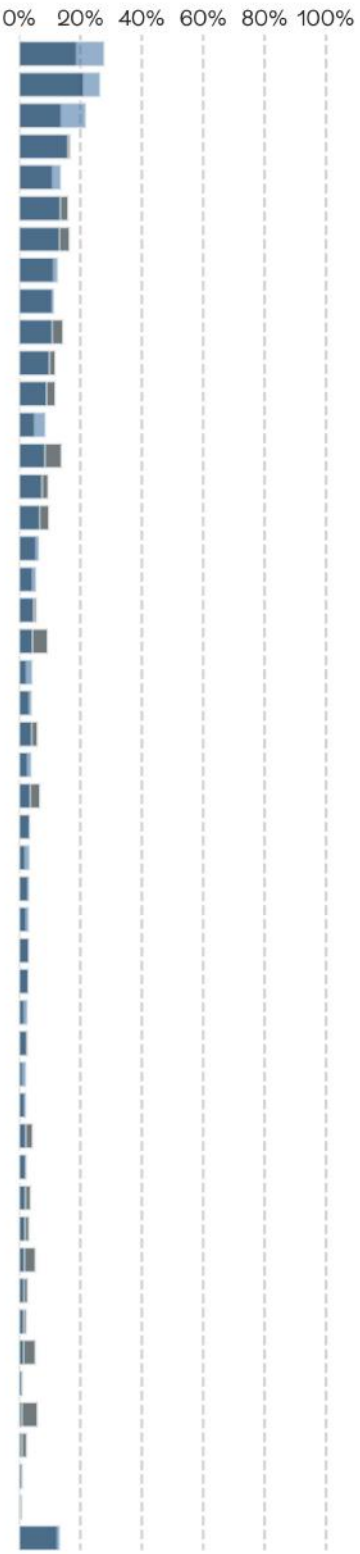


Most important criterion when deciding to travel to Switzerland (travel driver): SINGLE CHOICE	France_latest	Total
mountains	15.2%	16.5%
nature	14.3%	12.1%
panorama	8.5%↑↑↑	3.9%
lakes/rivers	8.4%↑↑↑	3.3%
city experiences	7.4%↑↑↑	2.2%
round trip/road trip/touring	6.5%↑↑↑	1.5%
active holidays/sports	6.5%↓↓	11.2%
snow/glaciers	4.2%↓↓	7.1%
art & culture	3.0%	1.2%
good value for money	2.5%↓↓↓	5.3%
short distances for experiences	2.3%	1.6%
pleasant climate/weather	2.0%	2.4%
family-friendliness	1.8%↓↓↓	6.5%
authenticity	1.6%	0.7%
high variety of experiences	1.4%	2.2%
maximum relaxation	1.4%	1.9%
good public transport (general)	1.0%↓↓↓	3.3%
atmosphere	1.0%	1.6%
hospitality	0.9%	2.0%
good accessibility	0.9%	1.1%
mountain pass roads	0.8%	0.4%
safety at destination	0.8%	1.1%
good catering/food	0.7%	1.6%
high quality standards	0.7%	1.4%
reliable service at destination	0.6%	0.6%
luxury	0.6%	0.3%
convenient travel options	0.6%	0.9%
historical experiences	0.6%	0.6%
entertainment/fun	0.6%	0.7%
traditions	0.5%	0.5%
adventure	0.4%	0.9%
sustainability	0.3%	0.5%
exceptional accommodation	0.2%	1.0%
evening programme/nightlife	0.2%	0.1%
shopping	0.0%	0.1%
other	1.4%	1.8%
n=	*1'045*	*22'651*

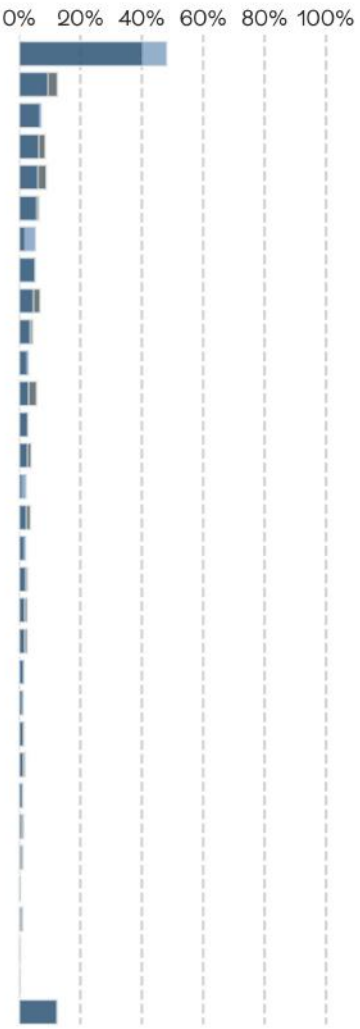


Destination Brand, Satisfaction and Customer Loyalty

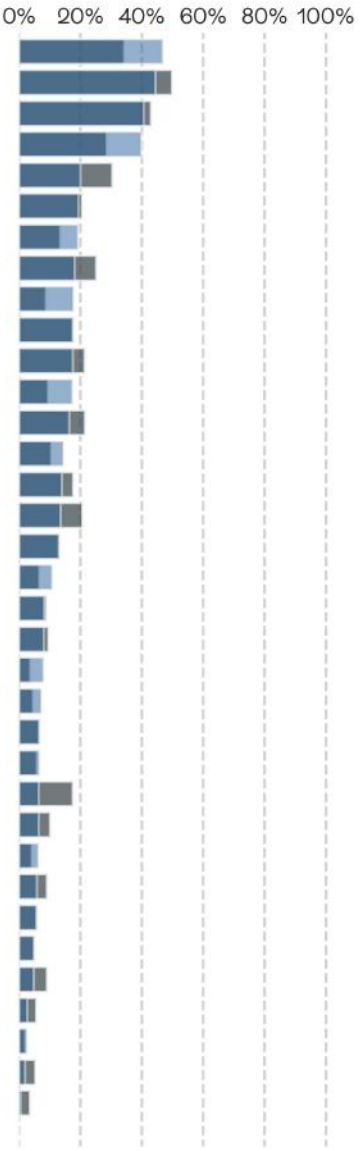
Touristic strengths	France_latest	Total
water (lakes, rivers, waterfalls)	27.7%↑	18.8%
panorama/scenery/landscape	26.4%	21.1%
rest/relaxation	21.8%↑↑	13.8%
mountains	15.9%	16.7%
beauty	13.6%	10.9%
gastronomy	13.4%	16.1%
nature	13.2%	16.5%
centrally located for day trips	12.6%	11.3%
friendliness/hospitality	11.3%	10.8%
public transportation	10.8%	14.3%
hiking	9.8%	11.8%
easy to reach from place of residence	9.0%	11.8%
history	8.6%↑↑	5.0%
winter sports	8.4%↓↓	13.9%
location	7.5%	9.5%
accommodation	6.7%↓	9.8%
cleanliness	6.5%	5.5%
art/culture	5.6%	4.3%
climate/weather	4.7%	5.7%
range of services/variety	4.3%↓↓↓	9.3%
authenticity	4.3%	2.4%
quality/reliability	4.1%	3.2%
shopping opportunities	4.1%	6.1%
safety	4.0%	2.7%
sports opportunities	3.6%↓↓	6.7%
old town	3.5%	3.4%
museums/galleries	3.3%	2.0%
village character	3.3%	2.9%
architecture	3.2%	2.3%
atmosphere	3.1%	3.1%
spa/wellness	3.1%	2.9%
festivals/theatres/events	2.7%	1.6%
touristic attractions	2.5%	2.8%
exclusiveness/prestige	2.3%	1.1%
convenience/comfort	2.3%	1.7%
mountain railways	2.2%↓↓↓	4.4%
nature attractions	2.1%	2.5%
infrastructure	2.0%	3.8%
price-performance ratio	1.9%	3.3%
small size/compactness	1.7%↓↓↓	5.4%
traffic-free/low traffic	1.6%	2.8%
special offers/guest card	1.5%	2.3%
snow (conditions)	1.4%↓↓↓	5.3%
tradition	1.1%	1.1%
family friendliness	0.9%↓↓↓	6.0%
few tourists/not crowded	0.9%	2.5%
nightlife	0.9%	1.1%
international flair	0.2%	0.9%
other	13.3%	12.5%
n=	*942*	*20'157*



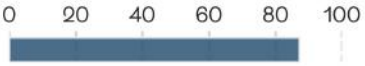
Touristic weaknesses	France_latest	Total
expensive	48.2%	40.2%
gastronomy/dining	9.4%↓	12.6%
does not offer enough/too small	7.4%	6.7%
too many tourists/too touristy	6.3%↓	8.6%
difficult to reach/remote	6.1%↓	9.0%
accommodation	5.7%	6.6%
not enough parking	5.5%↑↑↑	2.0%
not enough stores/shopping	5.3%	5.1%
public transportation	4.6%↓	6.9%
too much traffic	3.6%	4.6%
lack of signage/information	3.2%	2.5%
wintersport options/snow conditions	3.1%↓↓	5.8%
not enough nightlife	2.8%	3.0%
lack of infrastructure (general)	2.7%	4.0%
not enough art/culture/museums	2.4%	1.0%
climate/weather	2.3%	3.7%
foreign language skills/translations	2.2%	1.6%
not beautiful	2.2%	2.9%
opening hours of tourism office, stores...	1.8%	2.7%
mountain railways	1.8%	2.7%
noisy/chaotic/hectic	1.7%	1.4%
too luxurious/posh	1.5%	1.0%
unfriendly/not hospitable	1.4%	1.8%
other sports offers	1.3%	2.0%
not family-friendly	1.1%	1.4%
place is dying/cold beds/closed	0.9%	1.6%
dirty/unsave	0.5%	1.4%
spa & wellness	0.5%	0.6%
overbuilt	0.4%	1.2%
not enough bad weather options	0.3%	0.5%
lack of guest card benefits	0.0%	0.5%
other	12.5%	12.4%
n=	*720*	*14'961*



Brand image of visited destination	France_latest	Total
panorama	46.9%↑	34.3%
mountains	44.5%	49.8%
nature	40.6%	42.9%
lakes/rivers	39.8%↑	28.5%
active holidays/sports	20.0%↓↓	30.4%
good accessibility	19.4%	20.5%
safety at destination	19.2%↑	13.4%
good public transport (general)	18.1%↓	25.1%
city experiences	17.7%↑↑↑	8.8%
pleasant climate/weather	17.5%	17.7%
hospitality	17.5%	21.4%
authenticity	17.4%↑↑	9.5%
good catering/food	16.4%	21.5%
maximum relaxation	14.4%↑	10.4%
atmosphere	14.0%	17.6%
snow/glaciers	13.5%↓↓	20.5%
short distances for experiences	12.9%	13.1%
art & culture	10.8%↑↑	6.6%
reliable service at destination	8.1%	8.9%
high quality standards	8.1%	9.5%
round trip/road trip/touring	8.0%↑↑↑	3.6%
luxury	7.3%↑↑	4.5%
historical experiences	6.7%	6.4%
traditions	6.5%	5.8%
family-friendliness	6.4%↓↓↓	17.5%
good value for money	6.3%↓↓	10.1%
mountain pass roads	6.2%↑↑	4.1%
high variety of experiences	5.8%↓↓	9.1%
shopping	5.7%	5.5%
entertainment/fun	4.9%	4.8%
convenient travel options	4.8%↓↓	9.1%
adventure	2.6%↓↓↓	5.5%
evening programme/nightlife	2.4%	2.0%
exceptional accommodation	1.9%↓↓↓	5.2%
sustainability	0.5%↓↓↓	3.5%
other	0.0%	0.0%
n=	*961*	*20'666*

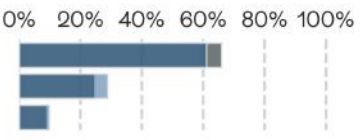


Satisfaction with destination [0-100]	France_latest	Total
mean	87.1	87.1
n=	*965*	*20'753*

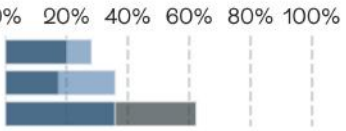


Recommendation of destination (Net Promoter Score NPS)	France_latest	Total
nps	51	57
n=	*964*	*20'745*

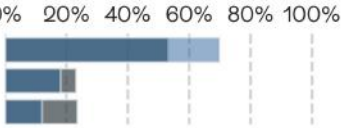
Recommendation of destination: promoters vs. detractors	France_latest	Total
promoters	61.0%	66.1%
passives	29.0%	24.8%
detractors	9.9%	9.2%
n=	*964*	*20'745*



Frequency visiting Switzerland	France_latest	Total
once	28.2%↑	20.2%
2-5 times	35.9%↑↑↑	17.4%
more than 5 times	35.8%↓↓	62.3%
n=	*983*	*21'213*



Frequency visiting the destination	France_latest	Total
once	69.9%↑	53.2%
2-5 times	18.1%	23.2%
more than 5 times	12.1%↓↓	23.6%
n=	*983*	*21'215*



Best alternative to destination visited in Switzerland. (Top 20)	France_latest	Total
Auvergne-Rhône-Alpes	15.7%↑↑↑	3.5%
Tyrol	9.1%	9.8%
Valais	4.2%	5.7%
Lombardy	3.8%	2.0%
Provence-Alpes-Côte d'Azur	3.8%	2.8%
Tuscany	3.5%	3.4%
Vienna	3.4%	1.8%
Brussels	3.1%↑↑↑	0.6%
Salzburg	2.7%	2.5%
Bavaria	2.6%	2.4%
Brittany	2.2%	0.8%
Piedmont	2.1%	1.5%
Puglia	2.0%	0.3%
Quebec	1.9%	0.2%
Vorarlberg	1.8%↓↓↓	4.1%
Bern	1.5%	3.3%
Ticino	1.4%	1.8%
California	1.4%	0.6%
Geneva	1.3%	0.5%
Bourgogne-Franche-Comté	1.3%	0.4%
n=	*365*	*9'414*

Legend

symbol	deviation of the target group value (column 1)
↑↑↑	at least a factor of 2.0 *and* at least 2.0 percentage points higher
↑↑	a factor between 1.5 and 1.99 *and* at least 2.0 percentage points higher
↑	a factor between 1.3 and 1.49 *and* at least 2.0 percentage points higher

symbol	deviation of the target group value (column 1)
↓↓↓	at least a factor of 2.0 *and* at least 2.0 percentage points lower
↓↓	a factor between 1.5 and 1.99 *and* at least 2.0 percentage points lower
↓	a factor between 1.25 and 1.49 *and* at least 2.0 percentage points lower

TMS at a glance

22,781	627	147	40+	5+M
sample size (n)	Swiss municipalities	source markets	topics	data points

The Tourism Monitor Switzerland (TMS) is conducted by Switzerland Tourism (ST) for the Swiss tourism industry and focuses on Swiss leisure overnight tourism with data provided by guests both from Switzerland and from abroad. Guests were recruited on-site at all tourism destinations around Switzerland. The online questionnaire was completed by 22,781 tourists immediately after their vacation, thus retrospectively.

The TMS is the largest national guest survey in terms of sample size, the number of FSO municipalities in which guests stay overnight, the number of countries of origin, the range of topics and the number of data points. The TMS online analysis tool enables high cross-linkability of the data, as they can be filtered and combined almost without restriction. In addition, the selected target group can be compared with a second, also freely definable group. Members and partners of Switzerland Tourism can access the database at https://tms.switzerland.pro/ . Destinations that have purchased additional sample sizes also benefit from an exclusive destination filter.

The most recent edition took place in 2023.

Reference: Switzerland Tourism | TMS 2023

Contact: bi@switzerland.com

Survey method

2,000+ daily assignments in 2023

email acquisition

Tourist email addresses are collected on site via an in-person approach from an ST interviewer at all tourism destinations around Switzerland. At these locations, recruitment takes place at different neutral spots. The more overnight stays a destination has, the more frequently it is visited by the interviewers.

This methodology aims to give every type of guest an equal chance of being included in the sample.

60,000+ email addresses

email dispatch

An email containing a link to the survey is sent as soon as the tourist's holiday ends. The survey is available in 17 languages.

Thanks to the retrospective approach, any response covers the entire holiday stay in Switzerland.

32% response rate

response & validity

Incentivisation (prize draw) and 2 reminders maximize the response rate.

To ensure the validity of the results, the analysis applies a weighting variable that is oriented towards the actual distribution of overnight stays by destination, season and guests' region of origin.