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Tourism in Switzerland – How can the future be?

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A R T I C L E   I N F O

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A B S T R A C T

The COVID-19 pandemic has dealt a severe blow to the tourism business in Switzerland. Although it is a minor position in the Swiss export balance, it is nevertheless of considerable importance for those regions of the country that attract domestic and foreign visitors. As a consequence of the lockdown measures, combined with close borders and travel bans, tourism collapsed and only briefly and partly recovered in summer. Its future is uncertain and depends on people’s (future guests’) attitudes and decisions as much as on the economy, political measures and, of course, the progress of the pandemic. Will there be an ‘after’ COVID-19?

1. Introduction

For many countries, tourism is a major factor in economy and society. A tourist is a person who travels by whatever means of transportation (from walking to using a space rocket), and who would usually spend some time away from home. Tourism statistics are mainly based on arrivals, beds available, and nights spent in registered tourist accommodation. Private accommodation (with friends or in second homes) is escaping this count. The data used must therefore be treated with caution; they only furnish a partial picture, particularly because day-tourism is hardly known.

Until 2019, tourism was part of everyday life and a major growth industry, globally (Schoder and Hunziker, 2011, p. 55) as well as sometimes regionally, following the neoliberal growth logic. Tourists spent money for travel, accommodation, food, souvenirs, gratuities etc. and frequently used the service of travel agencies. There were huge flows of money and many people had a job and could feed their families. On the other hand, the natural environment suffered, and also the populations in destination countries did not only reap benefits. Popular destinations like Venice or Barcelona experienced demonstrations against the large crowds, especially of day-visitors from cruise-ships that congest the streets and sights but spend hardly any money – the new term of overtourism was created (see also Mami, 2018 who talks about the situation in Kyoto and elsewhere).

This all changed in 2020 when the Covid-19 pandemic made this a special year in many respects. Many people saw their plans for travel and a change of air and surroundings ruined, airplanes were grounded, public transport half empty, hotels and restaurants lacked customers, and souvenir shops closed down – it looked like a revenge on overtourism. Lockdowns and closed boundaries were obstacles even to short trips, and the travel and tourism industry suddenly faced an uncertain future. “International tourist arrivals (overnight visitors) declined 70% in the first eight months of 2020 over the same period last year, amid global travel restrictions including many borders fully closed, to contain the ongoing COVID-19 pandemic.” (UNWTO, 2020, p. 1). This figure alone illustrates the effect of the national measures undertaken in the wake of the outbreak and global diffusion of the COVID-19 pandemic, and it contrasts sharply with the 1.4 billion tourists of 2019 (ibid., p. 4, provisional figure). From this collapse resulted an estimated loss of 730 billion USD (export value) with about 700 million arrivals less than in 2019 (ibid., p. 1). In Switzerland, the number of foreign tourists diminished by 62% in the first eight months of this year compared to 2019 (FSO, 2020). The general lockdowns and the retreat behind national boundaries slowed down life on a global scale and left many people stranded somewhere in the world with difficulties to return home immediately.

The few figures above offer a glimpse of the role tourism plays in our world under ‘normal’ circumstances. Many people like to spend at least some time away from home, temporarily abandoning their daily chores and obligations, and want to enjoy to be spoilt for a few days or weeks in a hotel or to travel and discover new worlds. International travel, however, has come to a standstill, resulting in a radical transformation of tourist habits.

Attempting to discuss the future of travel and tourism after COVID-19, particularly in Switzerland, is like looking into the crystal ball. Nobody can foresee the future, and nobody knows when ‘after COVID-19’ will be. Most tourism operators have written 2020 off, hoping (and planning) for 2021, others focus on 2022 (UNWTO, 2020, Annex 21) or...
even 2023, but nobody knows. This will therefore be a speculative paper with a few ideas but no certainties. In fact, we have to deal with two crises: the pandemic (a general problem for tourism), and global warming, presenting a headache for winter tourism.

This paper focuses on the former crisis and presents tourism in Switzerland before COVID-19 struck (the situation we used to consider normal), look briefly at the situation of the lockdown in 2020, and reflect on an unpredictable future.

2. Switzerland as a tourist destination

As one of the alpine countries, landlocked Switzerland with her mountains has to compete not only with her neighbours but with other destinations. There are, e.g., no coastal resorts. The advantage is that tourism in Switzerland benefits of a large diversity of beautiful landscapes in a relatively small space, offering many possibilities for various activities all the year round, in all seasons, although primarily in summer and winter. The offers of nature as well as culture are manifold, but unfortunately price levels throughout the country are high, and this can discourage many people from visiting. Despite this major drawback, millions of visitors from all over the world arrive(d) every year.

With an overall score of 5.0 (of 6) on the Travel and Tourism Competitiveness Index (TTCI), Switzerland occupies rank 10 of the 140 countries examined in 2019 (WEF, 2019, pp. vii & xii) and has retained this position from the previous years (ibid., p.8). A look at the details of the TTCI (ibid., pp. 64–83) puts the good result into perspective. Switzerland scores high due to an enabling environment and environmental sustainability (both rank 1), infrastructure and human resources and labour market (both rank 2), the business environment (rank 3), ground and port infrastructure (rank 4) and ICT readiness (rank 5). However, natural and cultural resources rank only on position 29, in international openness we are on rank 30, and our worst position (rank 137) is in price competitiveness – our major handicap.

The COVID-19 pandemic has taken a substantial toll. During the first nine months of 2020, the number of nights spent in hotels dropped by 39.4% relative to the same period in 2019, from 31.5 to 19.1 million. Domestic guests diminished by 10.9% (from 14.1 to 12.5 million) and to some extent saved the business, but they could not compensate the loss of 62.5% (from 17.4 to 6.5 million) among foreign visitors (BfS, 2020). Hotel nights do not represent total tourism but are a good indicator. They do, for example, not include people staying on campsites or in second homes.

2.1. Visitors to Switzerland

In 2018, Switzerland received 11.7 million international visitors (UNWTO, 2020, Annex 6), a mere 5.8% of tourist arrivals in Western Europe (ibid., Annex 3). To grasp the full extent of tourism, however, one has to include domestic travel that is not contained in the usual tourism statistics. The Federal Statistical Office calculates that every inhabitant undertook on average 9.4 day-trips (essentially inland trips) in 2018, altogether 71.8 million domestic tourists (FSO, n.d./1). Including the 11.7 million international guests, roughly 83.5 million people privileged Switzerland when they were looking for a change from everyday life, persons who contribute to the national economy, have a social impact of some sort, and influence the natural environment.

People visit a country for various reasons, and attractions and tastes are diverse. Price is an important factor, but not decisive – despite the high Swiss price level, many people still chose the country as their holiday destination. A distinguish, however, must be made between summer and winter tourism. The latter is focused on specific destinations (Zermatt, St. Moritz and Davos are the three most popular destinations for foreign visitors, domestic tourists mainly preferring smaller stations), whereas the former is quite diffuse, varying between lakes and mountains, and very popular with domestic visitors. Urban tourism, on the other hand, occupies a niche and is independent of the seasons. Tourism promotion adapts itself to this situation, but particularly in winter the offer has widened in the past few decades. Instead of simply emphasizing skiing, complementary activities such as snowshoe tours, walking, and wellness have been added. Each resort has its own way of marketing; due to uncertainties of the snow cover, winter resorts are diversifying their offer and develop their summer potential.

The visitors are as varied as the attractions. The categories used by the Swiss Tourism Agency (Fig. 1) are not mutually exclusive but offer an approximate picture. Nature lovers (24.6%), snow sports enthusiasts (21%) and outdoor enthusiasts (19%; My Switzerland 2019) make up almost two thirds of their number. But the family traveller could also be a nature lover, a snow lover or a culture tourist, and a luxury traveller could also visit a spa. Many guests often return (despite the high price level): two thirds are frequent visitors, i.e. have been here more than five times in their life (ibid.). They may own a second home or have developed friendly relations with a hotel owner, be attracted by a special place, or simply resist change.

2.2. Tourism and the national economy

Tourism contributes 2.9% to the Gross Domestic Income (OECD 2020, p. 288) and is not of primary importance for the national economy. Switzerland is an export-country, with manufacturing (all domains) and financial services the dominating sectors, contributing 11% and 9% respectively (2014 figures; FOS, n.d./2). The tourism sector (direct and indirect segments combined) employs less than 200,000 people, 181'700 full-time jobs in 2018, 4.4% of total employment (OECD 2020, p. 288), but it has a considerable local and regional impact. In the Grisons it amounts to about 30% of the cantonal economic performance, in the Valais about 25% (Schoder and Hunziker 2011, p. 55).

Financially speaking, international receipts from inbound tourism in 2018 amounted to 16,596 million Swiss Francs (CHF), surpassed, however, by international travel expenditure (outbound tourism) of 17,949 CHF of (OECD 2020, p. 291). Tourists also spend money, and consumption added more than 25,000 million CHF in 2014 (ibid., p.292; no more recent data available), 11 billion from domestic and 14 billion from international tourists. This largely compensates for the negative balance of travel expenditure.

2.3. Regional aspects

It is not necessarily Switzerland as a whole that attracts foreign visitors; they are often interested in visiting much publicized hotspots, such as Geneva, Lucerne, Interlaken and the Jungfraujoch (Top of Switzerland), Zermatt with the Matterhorn, St. Moritz, Davos – places that coined the image of the country but offer only a limited impression. To promote the entire country and offer a more comprehensive image, longer tours impose themselves, such as the Glacier Express from Zermatt to St. Moritz or vice versa, the Golden Pass Express from Lake Geneva to the Bernese Oberland and Lucerne, or the Preakps Express from Lucerne to Lake Constance, all run be the respective railway companies. For independent minded visitors who prefer to drive a car, Swiss Tourism has picked up the Renaissance concept of the Grand Tour of Europe, usually undertaken by young noblemen as part of their education, and developed the Grand Tour of Switzerland. It offers (international as well as domestic) visitors the possibility to see and experience most of the country including the hotspots – preferably in summer as some passes in winter risk to be closed. It uses the existing road network and is signposted (Fig. 2); visitors can drive along at their own rhythm and chose the daily sections independently. According to the time available and individual interests, the entire proposed route of 1,600 km may take at least a week of constant driving, but for a leisurely and informative holiday, it may be useful to allow more time or to focus on a specific section. However, it is unknown how many people have embarked on this tour, how much time they spent on it, and which route they chose.
The touristic potential varies among the cantons which have their own tourism laws and policy and profit from tourism to different degrees. While it contributes only 2.9% to the Gross National Income (GNI, see above), its share in the Grisons is 30% (Amt für Wirtschaft und Tourismus, 2006, p.1), in the canton of Valais 14.5% (Wertschöpfungsstudie über den Walliser Tourismus, 2016), but in Geneva only 2.1% (Informations statistiques, 2017). The Grisons are the most important tourism canton of the country, but COVID-19 passed over all of them like a steam-roller. The various regions were struck differently, but all saw the number of foreign tourists dwindle, whereas domestic tourism brought some relief.

The Jungfraujoch, marketed as Top of Switzerland, is a very popular destination thanks to its railway station at 3,454 m inside the mountain. It is particularly frequented by Asian visitors to the extent that it houses both a Chinese and an Indian restaurant. Its popularity makes it a victim of overtourism with more than one million visitors in 2019. However, this number dropped radically in 2020 as a consequence of COVID-19. The railway had to interrupt its service from March 14 to June 5, which translated into a substantial loss of guests in the first six months of this year (down from 470,600 to 100,600, –76.8%) and, logically, also a financial loss (-72.9%). This was the longest interruption of service since World War I (83 days; Jungfrau, 2020). Since Travel restrictions are not likely to be eased in the near future, the future of international travel does not look too good, and domestic visitors cannot make up for the deficit.

At any rate, domestic and international tourists have different interests. The Swiss try to avoid the crowded hotspots during the main season, when prices are higher than off-season, and they also tend to prefer smaller and more rural places. Urban and rural destinations attract different visitors. Cities such as Zürich and Geneva attract a lot of international business (both) and diplomatic (Geneva) travellers who will boost activities in the towns but will hardly frequent the countryside. Domestic tourists usually privilege internationally lesser known destinations and have their own preferences, linked to language, season, terrain, landscape, weather, family tradition etc. Popular regions in 2019 were (according to hotel accommodation) the Grisons, the Valais, Berne, Zürich, Ticino (STF, 2020, p. 23).

3. Pandemic, lockdown and consequences

On February 28, 2020, the Federal Council (the national executive) declared the special situation (stipulated in the law on epidemics), which allowed to overrule the cantons that are autonomous regional states with their own legislation and policies. Fighting the crisis thus became a central task with uniform regulations. The number of infections continued to rise, and on March 16, 2020, the Federal Council declared the extraordinary situation (equally stipulated in the law on epidemics) and closed the boundaries. International travel was prohibited with immediate effect; an exception was made for transborder commuters. Shops (apart from food shops and pharmacies), restaurants and leisure establishments were closed, people were asked to stay at home as far as possible. Festivals, parties and sports competitions were banned, home office was declared compulsory for people who could reasonably work from home, and all schools at all levels had to reorganise distance teaching. The entire country was in complete lockdown.

Life almost collapsed, but what at first looked entirely negative also had its positive sides: transport diminished radically, there was less traffic noise, less air pollution, and no traffic jams. People rediscovered solidarity with their fellow creatures and offered help to friends, relatives, neighbours and even hitherto unknown persons. Because canteens and restaurants were closed, families discovered the benefit of cooking at home. And school closure demonstrated to the parents what school really was about – they began to change their perception and appreciate the work performed by the teachers.

However, the economy suffered considerably, but of course there were winners and losers. Online shops boomed and with them postal and courier services, the food industry and pharmaceutical firms were not affected, and the farmers reorganized their business with direct deliveries and farm shops. The leisure sector was of course hard hit. With boundaries closed, international tourism collapsed; there were no hotel and restaurant guests, the specific transport infrastructure (ski lifts, mountain railways, funiculars etc.) came to a near standstill, and souvenir shops had to close, not only because they lacked their usual customers but also because as ‘not essential’ shops they were obliged to.

Since autumn 2020, Switzerland has been experiencing a second COVID-19 wave, significantly stronger than the one in spring, but this time the Federal Council largely renounced centrally imposed measures. Cantons had been back in charge after June 19 and were fully
had been the norm in the preceding years. Total nights spent in the fear of quarantine was looming) but many preferred to stay in their own
mer was therefore relatively quiet at the borders. Domestic tourism, on
in mid-April, which is usually a lucrative period (in 2020 still with ample
According to the official policy, a moderate approach would be more
-
- 0.9% or 21,921 nights
spent), whereas Zürich and Geneva were the biggest losers (−75.0%
and −78.1% respectively). The Grisons are a very popular family
destination, particularly with the Swiss National Park as an attractive
area for walking and nature observation. The two large city regions, on
the other hand, suffered from the breakdown of urban tourism – home
office and video conferences replaced face-to-face business meetings and
diplomatic conferences. The town of Lucerne, a must for Asian visitors
because of the lake and the watch and jewelry shops, was largely
deserted.

4. Outlook: An unpredictable future

The Covid-19 pandemic has dealt Swiss tourism a severe blow, and
the consequences have been negative for both the economy and social
wellbeing. The persisting uncertainty about the future and the rising
number of infections in summer and autumn 2020 that made
Switzerland a COVID-19 hotspot for some time are signs that it will not
recover quickly. To sum it up in five words: Stay home today, travel
tomorrow. But when will ‘tomorrow’ be?

‘Tourism is considered an activity essential to the life of nations
because of its direct effects on the social, cultural, educational and
economic sectors of national societies and their international relations.’
(Manila Declaration on World Tourism, 1980, Art. 1) Forty years ago,
this was taken for granted and the future looked bright, also for
Switzerland. Ten years ago, the State Secretariat for Economic Affairs
published a growth strategy that aimed, among others, to “capture
market shares within the European alpine regions” (SECO, 2010, p. 3),
focking on improving the overall framework conditions and promoting
tourism destinations (ibid., p.4). Affairs seemed to continue forever with
slight ups and downs, as the report by Abrahamsen et al. (2016) seems to
suggest: moderate global economic growth, however, gave rise to a
slightly pessimistic outlook as concerns the world economy (p.3).
nernational tourism, on the other hand, was judged as satisfactory (p.4).
From 2020 onwards, the situation looks radically different. The latest
report by Abrahamsen et al. (2020) opens with bad news: the winter
season recorded 23% less overnight stays compared to winter 2019
(p.1). The economic slowdown does not favour tourism, and domestic
travel is seen as a sort of substitute for conventional ways of spending
one’s holidays (ibid.). This was the forecast for summer 2020 (p.2) and it
proved correct, although the authors were a bit too optimistic as to
foreign visitors. New trends have emerged, such as proximity of desti-
nations, less known or remote places, rural rather than urban, or that
holidays are planned at short notice. This means for Switzerland that
international visitor groups will not return immediately and domestic
travel is likely to remain popular.

Outlining the future tourism policy in 2018, the Swiss Federal
Council refers to the following vision: “The tourism industry is inter-
nationally competitive and Switzerland is an attractive and productive
tourist destination.” (Swiss Federal Council 2018, p. 26). It focuses on
the tourism industry or businesses, “the central pillar of Swiss tourism.”
(ibid.), which includes all types of accommodation, transport, restaurant
and hotel catering, and “tourist-related products” (ibid., 12). The latter

\[1\] The cantons of Appenzell Innerhoden and Jura were also positive: +13.1%
or 15,854 and +5.4% or 3,722 visitors respectively, but they are minor
destinations.
includes “goods and services with significant importance to Swiss tourism, such as retailers, petrol stations and the healthcare sector.” (ibid., footnote 4). This list makes it difficult to distinguish between retailers etc. outside tourism – foreign visitors on the Grand Tour might purchase food in any village shop that serves the local population and have a drink in a village restaurant frequented by the locals. In other words: tourism is really important for the entire country. To have a tourist policy as guidelines for the future is positive, and fortunately the policy document quoted above does not include a forecast. Policy and real life usually do not match. The Swiss Association for Hotel Financing (SGH) is confronted with the tourism reality and has a cautious look into the future. In its 2019 Annual Report (SGH, 2020) it warns of the influence of the coronavirus on tourism and the resulting challenge (p.7), although the general mood was positive (the report was written in March, before the lockdown), fueled by a good start of the winter season. The consequences, however, “are still unknown and will clearly impact the tourist year.” (p.15). But it is interesting that the SGH notices an increasing environmental consciousness among the visitors (p.20).

There is an urgent need to make tourism sustainable (Swiss Goal 8.9 of SDG 8) if we want to continue to remain an appealing and successful tourist destination. The available potential can be exploited and a resource-efficient growth generated if, by 2030 if it is possible to “devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products.” (Platform Agenda 2030, 2018, p.73). Similarly, it is important to “[d]evelop and implement tools to monitor sustainable development impacts for sustainable tourism that creates jobs and promotes local culture and products.” (Swiss Goal 12.b of SDGC 12 in ibid., p.74). One term in this, however, merits to be questioned: is this persistent focus on ‘growth’ really vital, the idea that everything can increase forever? It has an exclusively material (quantitative) meaning, but it inevitably has its limits and we have to become aware of them – more than 50 years have passed since the alarm was raised (Meadows et al., 1972), but humanity does not seem to have understood. We know that permanent growth is an illusion and that we have probably reached the peak (see Dorling, 2020, pp. 85, 181, 284). A truly sustainable tourism will respect nature and the complexity of the ecosystem, and this is the task and the responsibility of the tourists themselves. As Dorling (2020), p. 19 wrote: “In the future most tourism will be ecotourism, just as most paint in most countries is now unleaded paint.”

“The future’s not our’s to see” is part of the lyrics of the song Que sera, sera, sung by Doris Day in Hitchcock’s The man who knew too much, and this of course applies also to the topic of this paper. What will be in the future depends on many factors and how human actors deal with them. As far as Swiss tourism is concerned, three such factors are decisive: location (where), possibilities (activities), price structure (how much), aware that ‘after COVID-19’ is at the moment just a vague idea. Nobody knows if people will be able to go back to ‘normal’ as it was before, or if they have learnt the lesson that our habitual pre-COVID-19 lifestyle was somewhat exaggerated. Cautious optimists seem to prevail, as Laurent Vanat who, in an interview in the Fribourg daily La Liberte (2020) suggested that “professionals expect a return to pre-pandemic frequencies not before 2024.” (Abrahamsen et al. (2020), p. 5 are more careful: they confront a downward with an upward trend. It all depends on how long the pandemic is going to last, how strict restrictions are and if they can be revoked or must be reinforced, whether intercontinental flights will be available, how the economic situation evolves, etc. – it is all but certain how Switzerland will be the same tourism destination it once was and how many actors hope it will be.

Expectations are that vaccinations will allow for a return to normalcy – meaning a situation close to the one before COVID-19. This concerns tourism as a whole, not only in Switzerland. But it may be better to be a bit skeptical about this. First, do people really want to go back to the situation of overtourism as was typical in some regions until 2019? If the goal of sustainable tourism is to be attained, the answer must be ‘no’. Second, the long-term effectiveness of vaccinations is not yet proven, hence one must be cautious with such expectations. Third, and this is a practical point, every tourist worldwide would have to be vaccinated twice (according to current knowledge) to guarantee sufficient and long-term projection. Looking at the figures at the beginning of this paper, this would mean 2.8 billion vaccinations across the globe (two per person), an astronomical number and a logistic challenge. The situation in January is proof for the difficulties with administering even the most urgent vaccinations. A ‘new normalcy’ will emerge after the pandemic, once (when?) it will be over, but nobody knows what this new normalcy will look like.

Optimism, however, still reigns. On December 5, the Jungfrau Railways opened the newly constructed Eiger Express, a cable car that takes travelers from Grindelwald straight to the Eigergletscher station where they can change to the rack railway to the Junfraujoch (Grindelwald, 2020). This is much simpler and 47 min shorter than with the railway up to Kleine Scheidegg and change to the train for the Jungfrau – a great advantage when time is money, even on holiday². It will take some time

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² Since the slowdown is already under way, humanity may discover a new quality of time (see Dorling 2020).
until the true benefits of this investment will become visible, an investment that was decided upon many years ago and that took a long time to materialize. There is still hope.

Postscript (March 2021)
The paper was originally written in December 2020 and January 2021. In the meantime, Switzerland permitted the opening of the winter sports resorts (as the first country in the Alps) and the skiing season has been in full swing, albeit with strict security measures (limited number of tickets for ski-lifts, face masks, distance keeping in the queues). Since all restaurants were closed (apart from takeaways), there was not much of a social side of a skiing weekend. Even if tourists (still mostly domestic) largely complied with the rules, nobody hopes that this will be the future of tourism.

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The author declare that they have no known competing financial interests or personal relationships that could have appeared to influence the work reported in this paper.

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