Tourism Monitor Switzerland

2023

swi+zerland

Sample description

Target group: «Scuol Zernez, Samnaun, Val Müstair»

Definition:

- Location of holiday: partner destination: "Engadin Scuol Zernez", "Samnaun", "Val Müstair"

Sample size: n=942, high result precision.

Comparison group: «Mountain»

Definition:

- Location of holiday: tourism zone: "mountain"

**Sample size:** n=13089, very high result precision

Report Summary

Market Share

Relevance: The target group «Scuol Zernez, Samnaun, Val Müstair» accounts for approximately 1.9% of the Swiss overnight tourism market in the leisure sector.
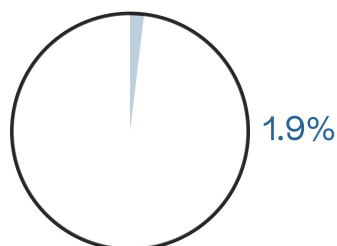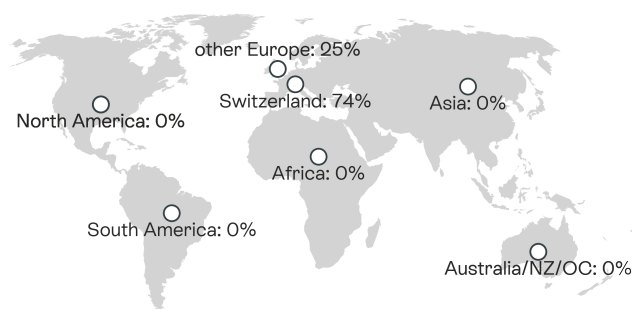
Relevance: The comparison group «Mountain» accounts for approximately 61.7% of the Swiss overnight tourism market in the leisure sector.
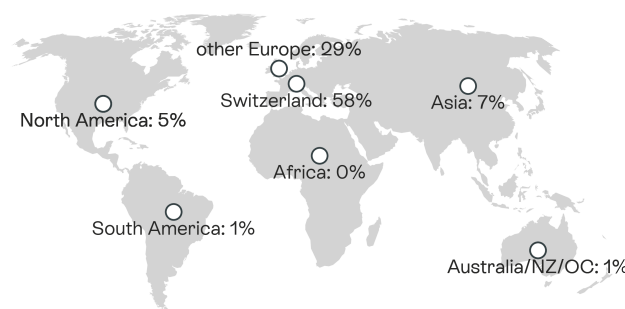
1.9%

Scuol Zernez, Samnaun, Val Müstair

61.7%
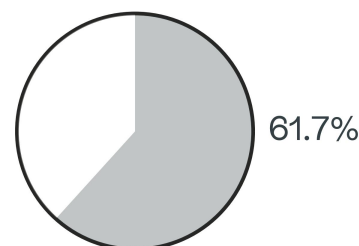
Mountain

Traveller Profiles and Preferences (general)

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

other Europe: 25%
Switzerland: 74%
Asia: 0%
North America: 0%
Africa: 0%
South America: 0%
Australia/NZ/OC: 0%

Scuol Zernez, Samnaun, Val Müstair | Total: 100%

other Europe: 29%
Switzerland: 58%
Asia: 7%
North America: 5%
Africa: 0%
South America: 1%
Australia/NZ/OC: 1%

Mountain | Total: 100%

The target group is particularly over-represented in Switzerland (+16 percentage points relative to the comparison group), Germany (+5 pp.) and Poland (+1 pp.).

Scuol Zernez, Samnaun, Val Müstair
• Switzerland (74%)
• Germany (17%)
• BeNeLux (3%)
• Austria (1%)
• France (1%)

Mountain
• Switzerland (58%)
• Germany (12%)
• United Kingdom (4%)
• BeNeLux (4%)
• United States of America (4%)

The place of residence was also recorded at the regional level within countries. 68% of the target group comes from these regions (out of a total of 812): Zurich (22%), Bern (8%), St. Gallen (8%), Aargau (8%), Baden-Württemberg (6%), Lucerne (4%), Thurgau (4%), Solothurn (3%), Bavaria (3%), Vaud (2%).

Age & gender: Tourists in the target group typically range from 41 to 61 years old (middle 50%), with an average age of 51. The group is predominantly male (50%). The comparison group lies between 36 and 59 years old, has an average age of 48 and a 51% male share. The target group is therefore older (3 years) and contains more female tourists (+1 percentage points) in comparison.

Scuol Zernez, Samnaun, Val Müstair — Mountain
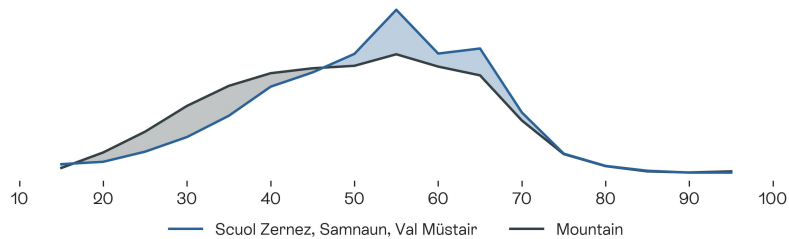
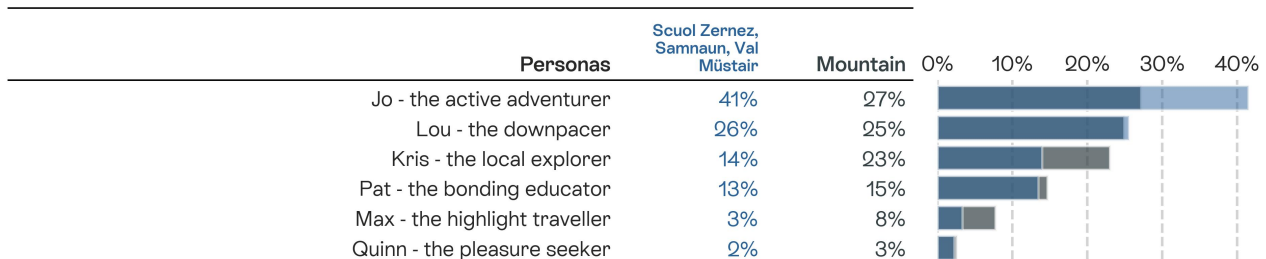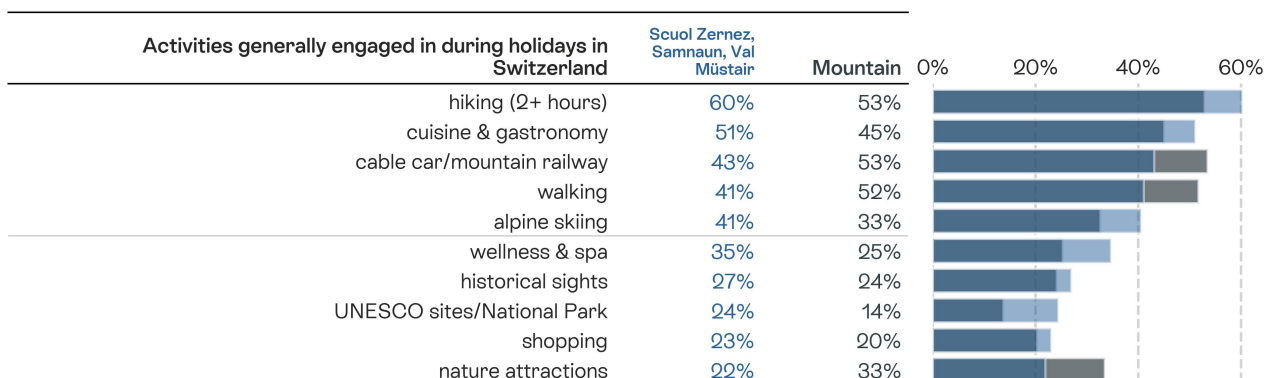**Personas:** Tourists are assigned to the primary personas for both the target group (on the left) and the comparison group (on the right), but only for the summer season: Persona questions were not included in the TMS winter survey, as they were not available at the time. In a direct comparison between these groups, Jo - the active adventurer (+14 percentage points relative to the comparison group) and Lou - the downpacer (+1 pp.) are notably over-represented within the target group.

Personas	Scuol Zernez, Samnaun, Val Müstair	Mountain	
Jo - the active adventurer	41%	27%	
Lou - the downpacer	26%	25%	
Kris - the local explorer	14%	23%	
Pat - the bonding educator	13%	15%	
Max - the highlight traveller	3%	8%	
Quinn - the pleasure seeker	2%	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 UNESCO sites/National Park (+10 percentage points), wellness & spa (+10 pp.) and alpine skiing (+8 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	Scuol Zernez, Samnaun, Val Müstair	Mountain	
hiking (2+ hours)	60%	53%	
cuisine & gastronomy	51%	45%	
cable car/mountain railway	43%	53%	
walking	41%	52%	
alpine skiing	41%	33%	
wellness & spa	35%	25%	
historical sights	27%	24%	
UNESCO sites/National Park	24%	14%	
shopping	23%	20%	
nature attractions	22%	33%	

Travel habits (general): The TMS data reveals that 47% of the target group plan their trip well in advance, 79% book accommodation directly and 84% belong to the mid or high price travel segment (comparison group: 50%, 66%, and 83%, respectively). The following diagram also provides information on other key aspects of the general travel behaviour for both the target and comparison groups.

one holiday per year — two or more holidays per year
travel offers outside the internet — travel offers on the internet
low price segment — mid or high price segment
booking accommodation via intermediary — booking directly at accommodation
spontaneously and short notice planning — far in advance planning
visiting new places — visiting familiar places

● Scuol Zernez, Samnaun, Val Müstair   ● Mountain

Sources of Information and Travel Decision

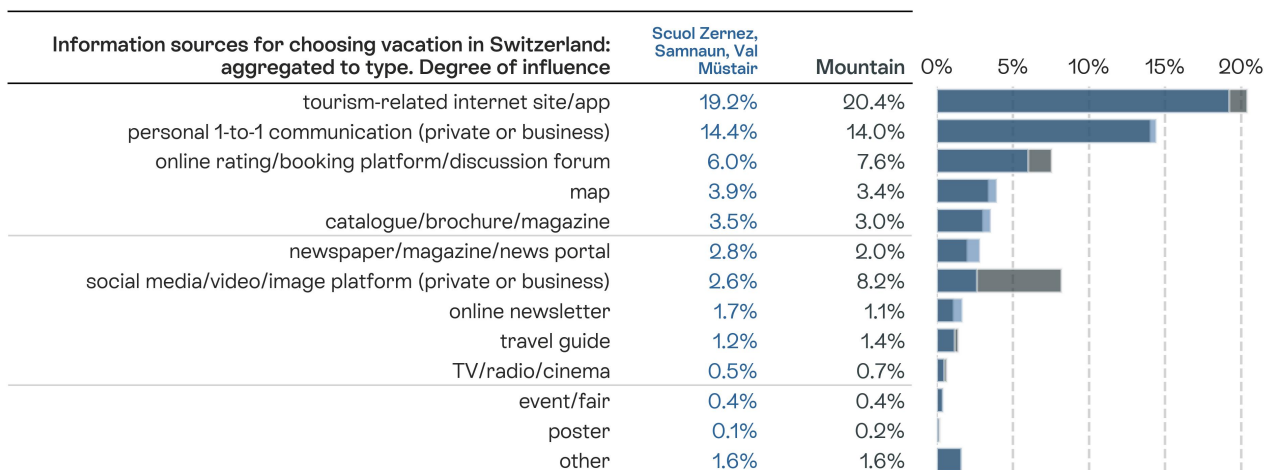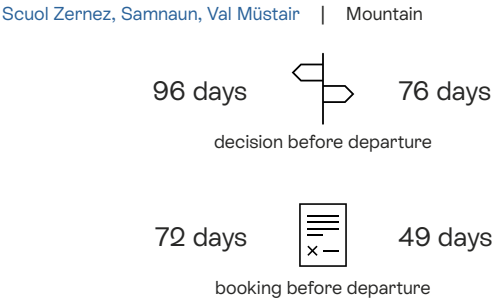**Sources of information:** The TMS examines 74 sources of information regarding decision-making to have spent last vacation in Switzerland. The average overall external influence on target tourists is 58%, compared to 64% for the comparison group. This total influence can be detailed by individual information 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	Scuol Zernez, Samnaun, Val Müstair	Mountain
people in the tourist's private circle: from person to person	12.0%	11.6%
internet site/app from local/ regional tourism organization	8.6%	6.8%
online ratings/booking platforms/discussion forums	6.0%	7.6%
internet site/app from national tourism organization "Switzerland Tourism"	3.5%	4.4%
internet site/app from accommodation	2.9%	3.0%
digital map	2.8%	2.6%
internet site/app from local provider of excursions/activities/attractions	1.6%	2.0%
internet site/app from transport companies (only arrival and departure)	1.4%	1.9%
independent report in newspaper/magazine/news portal	1.3%	0.7%
internet site/app from tour operator/travel provider/travel agent	1.3%	2.4%

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%. newspaper/magazine/news portal (+1 percentage points), online newsletter (+1 pp.) and map (+1 pp.) are particularly characteristic for the target group.

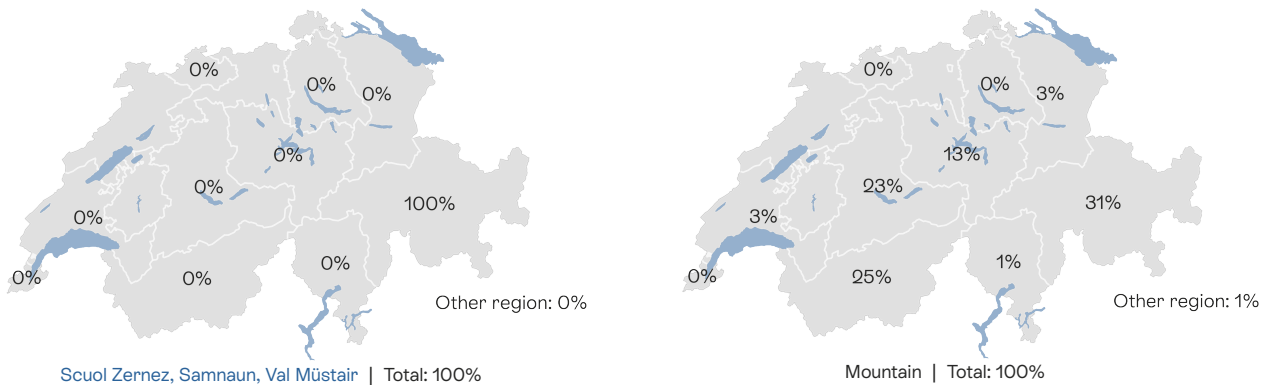| Information sources for choosing vacation in Switzerland: aggregated to type. Degree of influence	Scuol Zernez, Samnaun, Val Müstair	Mountain
tourism-related internet site/app	19.2%	20.4%
personal 1-to-1 communication (private or business)	14.4%	14.0%
online rating/booking platform/discussion forum	6.0%	7.6%
map	3.9%	3.4%
catalogue/brochure/magazine	3.5%	3.0%
newspaper/magazine/news portal	2.8%	2.0%
social media/video/image platform (private or business)	2.6%	8.2%
online newsletter	1.7%	1.1%
travel guide	1.2%	1.4%
TV/radio/cinema	0.5%	0.7%
event/fair	0.4%	0.4%
poster	0.1%	0.2%
other	1.6%	1.6%

Days in advance for vacation decision and booking: Tourists in the target group typically decide to travel to Switzerland between 33 and 193 days before departure (middle 50%), with a median of 96 days. Following this, they book their trip or accommodation 159 to 16 days in advance, with a median of 72 days. They make their decision 20 days earlier and book 23 days earlier than the comparison group:

Scuol Zernez, Samnaun, Val Müstair | Mountain

96 days ⌐──▷ 76 days

decision before departure
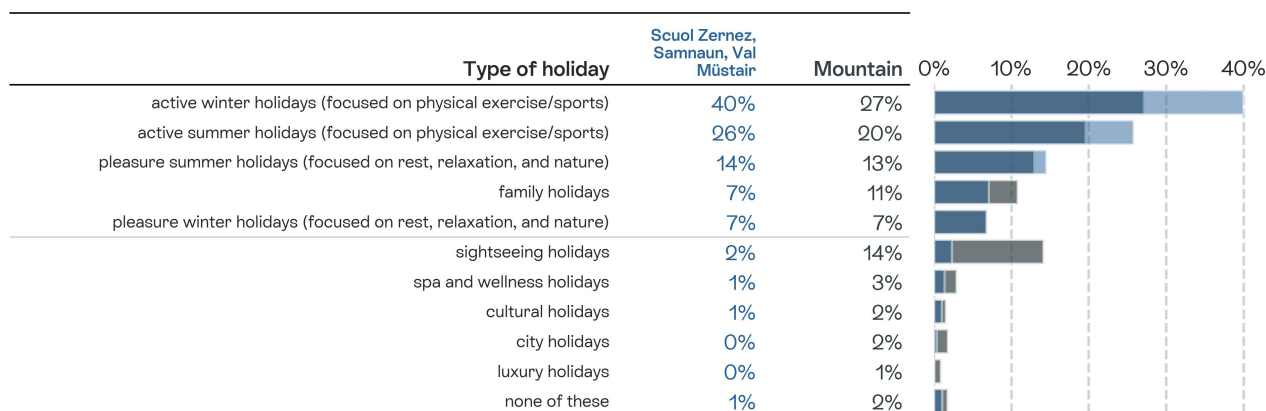
72 days [▤] 49 days

booking before departure

Destination vs. Accommodation: When asked about the most decisive factor when choosing accommodation, 58% of the target group selected 'destination more decisive', followed by 26% who chose 'accommodation more decisive' and 16% who chose 'accommodation more decisive'. For tourists in the target group, the destination is less important (-4 percentage points) than the accommodation as it is for the comparison group (62%).

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 Graubünden . They are mostly over-represented in Graubünden (+69 percentage points).

0% 0% 0%
0%
0% 0%
0% 100%
0% 0% 0%
0%

Other region: 0%

Scuol Zernez, Samnaun, Val Müstair | Total: 100%

0% 0% 3%
13%
23% 31%
3% 1%
0% 25%

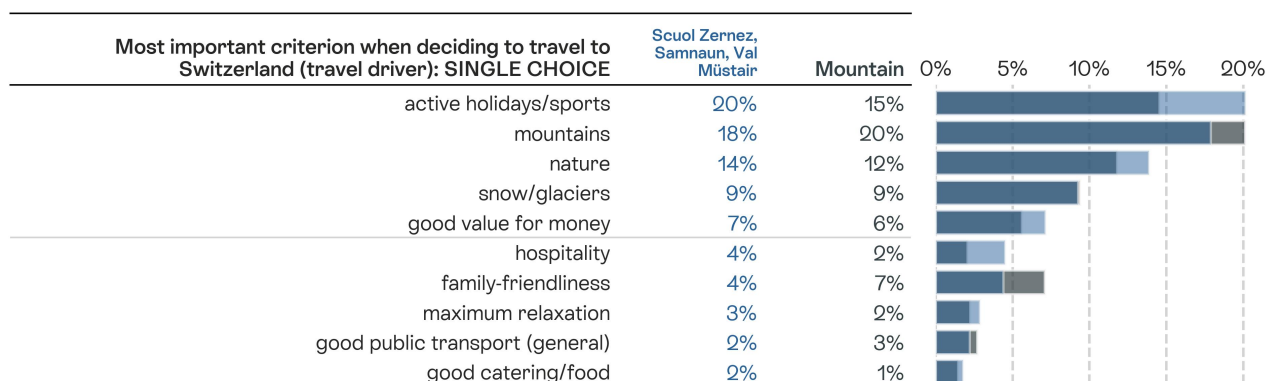Other region: 1%

Mountain | Total: 100%

Type of holiday: A self-classification into 10 rough holiday types based on season, tourism zone, and/or needs shows that "active winter holidays (focused on physical exercise/sports)" is the most dominant category within the target group, with a share of 40%. In terms of over-representation, "active winter holidays (focused on physical exercise/sports)" (+13 percentage points), "active summer holidays (focused on physical exercise/sports)" (+6 pp.) and "pleasure summer holidays (focused on rest, relaxation, and nature)" (+1 pp.) best characterizes the target group.

Type of holiday	Scuol Zernez, Samnaun, Val Müstair	Mountain
active winter holidays (focused on physical exercise/sports)	40%	27%
active summer holidays (focused on physical exercise/sports)	26%	20%
pleasure summer holidays (focused on rest, relaxation, and nature)	14%	13%
family holidays	7%	11%
pleasure winter holidays (focused on rest, relaxation, and nature)	7%	7%
sightseeing holidays	2%	14%
spa and wellness holidays	1%	3%
cultural holidays	1%	2%
city holidays	0%	2%
luxury holidays	0%	1%
none of these	1%	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 active holidays/sports (+5 percentage points), hospitality (+2 pp.), and nature (+2 pp.) than the comparison group.

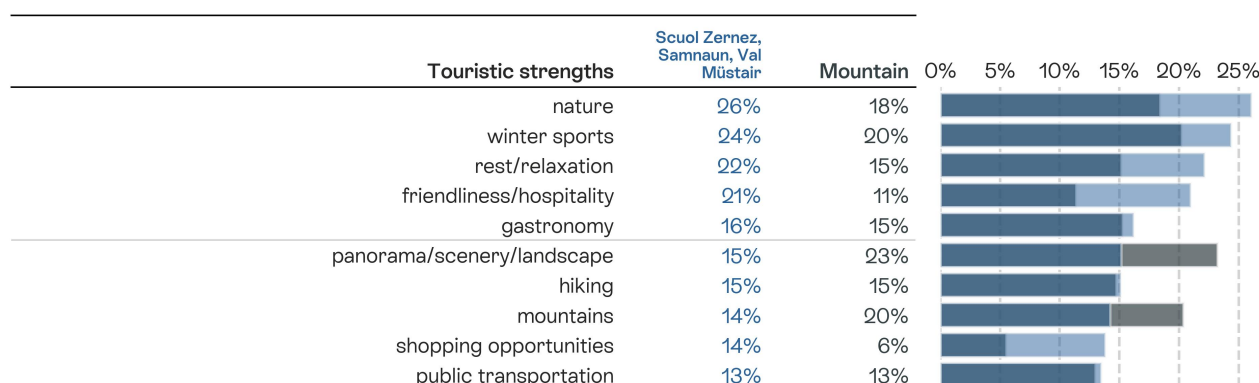| Most important criterion when deciding to travel to Switzerland (travel driver): SINGLE CHOICE	Scuol Zernez, Samnaun, Val Müstair	Mountain
active holidays/sports	20%	15%
mountains	18%	20%
nature	14%	12%
snow/glaciers	9%	9%
good value for money	7%	6%
hospitality	4%	2%
family-friendliness	4%	7%
maximum relaxation	3%	2%
good public transport (general)	2%	3%
good catering/food	2%	1%

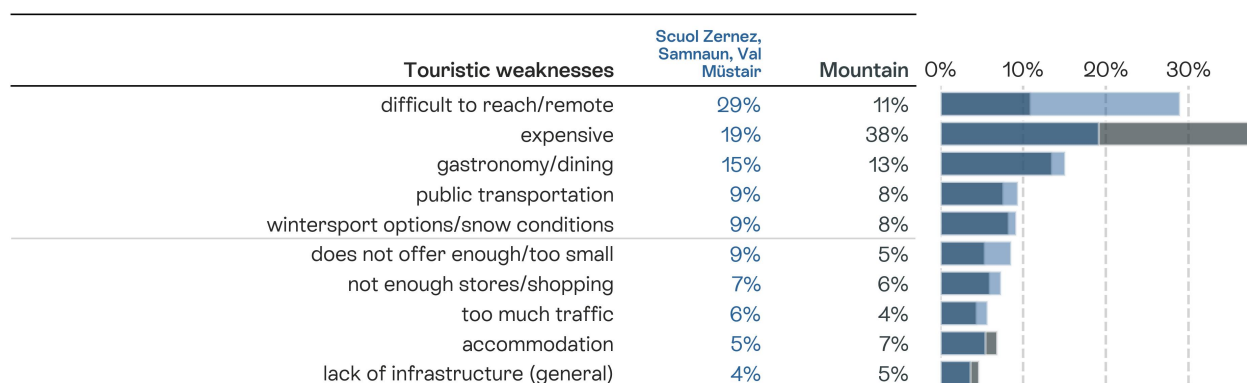# Destination Brand, Satisfaction and Customer Loyalty

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 (3'455 from the target group, 44'752 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: friendliness/hospitality (+10 percentage points relative to the comparison group), shopping opportunities (+8 pp.), and nature (+8 pp.).

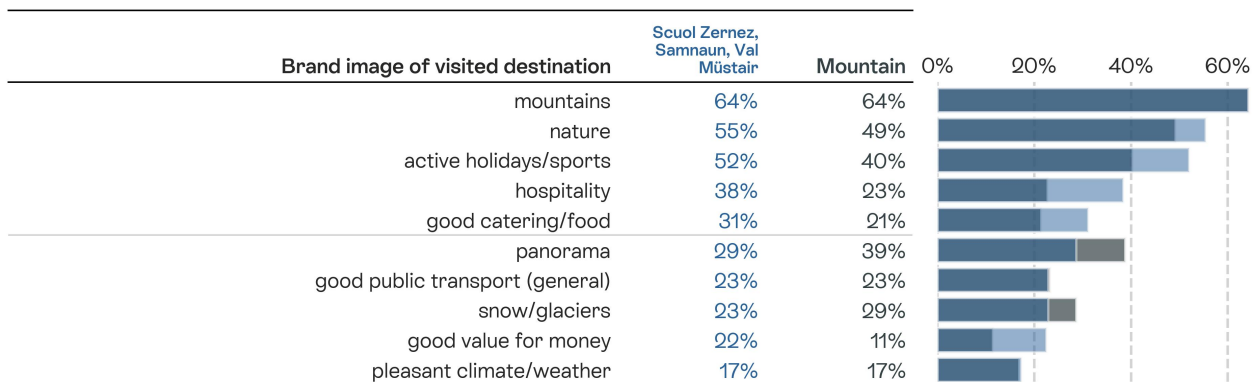| Touristic strengths	Scuol Zernez, Samnaun, Val Müstair	Mountain	
nature	26%	18%	
winter sports	24%	20%	
rest/relaxation	22%	15%	
friendliness/hospitality	21%	11%	
gastronomy	16%	15%	
panorama/scenery/landscape	15%	23%	
hiking	15%	15%	
mountains	14%	20%	
shopping opportunities	14%	6%	
public transportation	13%	13%	

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 (998 from the target group, 15'552 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: difficult to reach/remote (+18 percentage points), does not offer enough/too small (+4 pp.), and public transportation (+1 pp.).

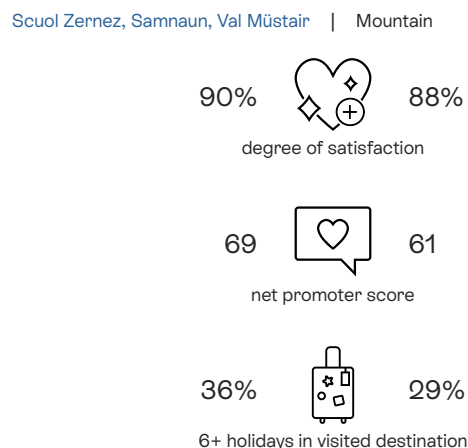| Touristic weaknesses	Scuol Zernez, Samnaun, Val Müstair	Mountain	
difficult to reach/remote	29%	11%	
expensive	19%	38%	
gastronomy/dining	15%	13%	
public transportation	9%	8%	
wintersport options/snow conditions	9%	8%	
does not offer enough/too small	9%	5%	
not enough stores/shopping	7%	6%	
too much traffic	6%	4%	
accommodation	5%	7%	
lack of infrastructure (general)	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.
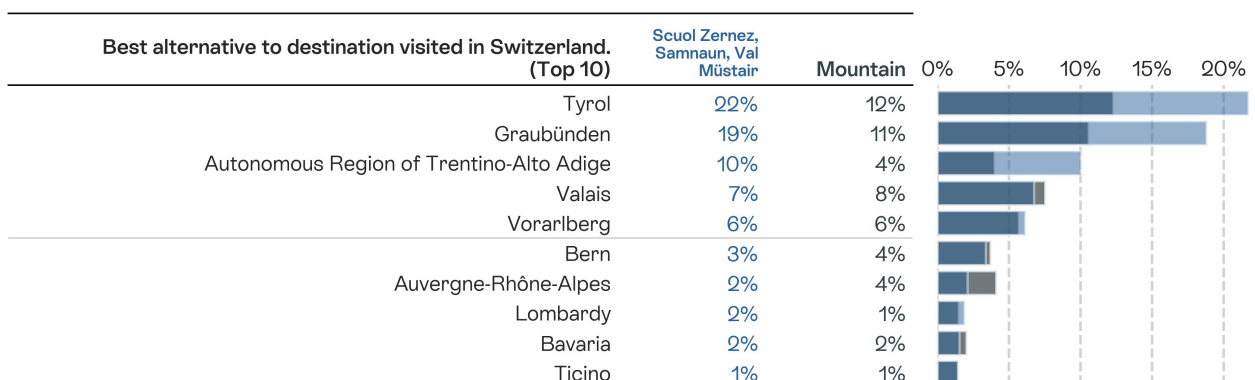
Relative to the comparison group, the destination visited by the target group stands out in these three areas: hospitality (+15 percentage points), active holidays/sports (+12 pp.), and good value for money (+11 pp).

Brand image of visited destination	Scuol Zernez, Samnaun, Val Müstair	Mountain
mountains	64%	64%
nature	55%	49%
active holidays/sports	52%	40%
hospitality	38%	23%
good catering/food	31%	21%
panorama	29%	39%
good public transport (general)	23%	23%
snow/glaciers	23%	29%
good value for money	22%	11%
pleasant climate/weather	17%	17%

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 a higher level of satisfaction (+2 percentage points), a higher NPS (+8 points), and a larger share of tourists with 6 or more visits to the destination (+7 pp.) than the comparison group.

Scuol Zernez, Samnaun, Val Müstair | Mountain

90% 88%
degree of satisfaction

69 61
net promoter score

36% 29%
6+ holidays in visited destination

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)	Scuol Zernez, Samnaun, Val Müstair	Mountain
Tyrol	22%	12%
Graubünden	19%	11%
Autonomous Region of Trentino-Alto Adige	10%	4%
Valais	7%	8%
Vorarlberg	6%	6%
Bern	3%	4%
Auvergne-Rhône-Alpes	2%	4%
Lombardy	2%	1%
Bavaria	2%	2%
Ticino	1%	1%

Detail

Traveller Profiles and Preferences (general)

Origin of tourists: Switzerland - other Europe - overseas	Scuol Zernez, Samnaun, Val Müstair	Mountain
Switzerland	74.0%	57.6%
other Europe	25.3%	28.6%
overseas	0.7%↓↓↓	13.8%
n=	942	13'089

Source market (permanent residence): ST markets	Scuol Zernez, Samnaun, Val Müstair	Mountain
Switzerland	74.0%	57.6%
Germany	16.9%↑	11.9%
BeNeLux	3.2%	3.9%
Austria	0.9%	0.6%
France	0.7%	2.4%
United Kingdom	0.7%↓↓↓	3.9%
Poland	0.7%	0.4%
Czech Republic	0.5%	0.4%
Nordics (NO, SE, FI, DK)	0.5%	0.9%
United States of America	0.3%↓↓↓	3.6%
Italy	0.3%	1.2%
Spain	0.2%	1.0%
Australia NZ OC	0.2%	1.1%
Canada	0.1%	0.7%
South East Asia (SI, TH, MY, ID)	0.0%	1.9%
Greater China	0.0%	1.7%
India	0.0%	1.1%
Republic of Korea	0.0%	0.6%
Brazil	0.0%	0.6%
Gulf Countries (GCC)	0.0%	0.5%
Portugal	0.0%	0.3%
Philippines	0.0%	0.3%
Japan	0.0%	0.2%
Other (non-ST market)	0.9%↓↓↓	3.0%
n=	942	13'089

Source market (permanent residence): continent	Scuol Zernez, Samnaun, Val Müstair	Mountain
Switzerland	74.0%	57.6%
other Europe	25.3%	28.6%
North America	0.4%↓↓↓	4.7%
Australia/NZ/OC	0.2%	1.1%
Africa	0.1%	0.2%
Asia	0.0%	6.9%
South America	0.0%	0.9%
n=	942	13'089

Your permanent residence. Region (Top 20):	Scuol Zernez, Samnaun, Val Müstair	Mountain	0% 20% 40% 60% 80% 100%
Zurich	22.4%↑↑	13.7%	
Bern	8.1%	7.6%	
St. Gallen	7.9%↑↑↑	2.7%	
Aargau	7.8%↑	5.8%	
Baden-Württemberg	5.5%↑↑	3.5%	
Lucerne	4.4%	3.4%	
Thurgau	3.6%	1.8%	
Solothurn	2.8%	2.5%	
Bavaria	2.7%	2.1%	
Vaud	2.1%↓↓	4.5%	
Basel-Stadt	2.1%	1.8%	
Graubünden	2.0%	0.5%	
North Rhine-Westphalia	1.9%	2.0%	
Schwyz	1.7%	1.1%	
Berlin	1.6%	0.8%	
Hesse	1.3%	0.9%	
Fribourg	1.2%	1.9%	
Basel-Land	1.1%	3.1%	
Nidwalden	1.1%	0.4%	
Saxony	1.0%	0.5%	
n=	933	12'718	

Age (mean)	Scuol Zernez, Samnaun, Val Müstair	Mountain	0 20 40 60 80 100
mean	51.2	47.6	
n=	864	12'108	

Age (3 categories)	Scuol Zernez, Samnaun, Val Müstair	Mountain	0% 20% 40% 60% 80% 100%
16-35 years	15.0%↓↓	23.4%	
36-55 years	42.7%	44.8%	
56+ years	42.3%↑	31.7%	
n=	864	12'108	

Age (14 categories)	Scuol Zernez, Samnaun, Val Müstair	Mountain	0% 20% 40% 60% 80% 100%
16-20 years	2.5%	1.3%	
21-25 years	2.5%	4.4%	
26-30 years	4.1%↓↓	7.4%	
31-35 years	5.9%↓↓	10.3%	
36-40 years	8.1%↓	11.6%	
41-45 years	11.0%	11.8%	
46-50 years	11.4%	11.1%	
51-55 years	12.3%	10.3%	
56-60 years	15.4%↑	10.4%	
61-65 years	10.4%	8.6%	
66-70 years	10.1%↑	7.3%	
71-75 years	4.5%	3.6%	
76-80 years	1.3%	1.2%	
81+ years	0.6%	0.5%	
n=	864	12'108	

Gender	Scuol Zernez, Samnaun, Val Müstair	Mountain	0% 20% 40% 60% 80% 100%
male	50.3%	51.4%	
female	49.7%	48.6%	
n=	902	12'535	

Personas	Scuol Zernez, Samnaun, Val Müstair	Mountain	0% 20% 40% 60% 80% 100%
Jo - the active adventurer	41.5%↑↑	27.1%	
Lou - the downpacer	25.5%	24.9%	
Kris - the local explorer	13.9%↓↓	23.0%	
Pat - the bonding educator	13.5%	14.7%	
Max - the highlight traveller	3.3%↓↓↓	7.7%	
Quinn - the pleasure seeker	2.2%	2.5%	
n=	362	5'157	

Activities generally engaged in during holidays in Switzerland	Scuol Zernez, Samnaun, Val Müstair	Mountain	0% 20% 40% 60% 80% 100%
hiking (2+ hours)	60.2%	52.8%	
cuisine & gastronomy	51.0%	45.0%	
cable car/mountain railway	43.1%	53.4%	
walking	41.0%	51.7%	
alpine skiing	40.5%	32.6%	
wellness & spa	34.6%↑	25.3%	
historical sights	26.9%	24.1%	
UNESCO sites/National Park	24.3%↑↑	13.7%	
shopping	23.0%	20.3%	
nature attractions	21.9%↓↓	33.4%	
stay by lakes/rivers	20.0%↓	27.7%	
museums & exhibitions	13.2%	14.7%	
mountain biking	11.6%	9.8%	
tobogganing	10.8%	9.5%	
snowshoeing	9.3%↑	6.6%	
local events	7.7%	9.0%	
cross-country skiing	7.2%	6.7%	
snowboarding	5.5%	6.1%	
long-distance hiking (2+days)	5.5%	4.4%	
off-piste skiing	4.8%	4.3%	
boat excursion	4.7%↓↓↓	14.8%	
jogging	4.7%↓	6.8%	
local activities	4.6%	3.9%	
nightlife	3.8%↓↓	7.5%	
riding a touring bike	2.6%	3.9%	
roadcycling	2.5%	1.8%	
gravel biking	2.1%	1.3%	
stand-up paddling	1.9%	3.0%	
christmas markets	1.3%↓↓↓	3.9%	
content creation spots for SoMe	1.0%	2.3%	
golf	0.5%	1.6%	
paragliding	0.5%	2.3%	
training camps	0.0%	0.2%	
other	7.8%	8.8%	
n=	942	13'089	

Travel habits: spontaneously vs. far in advance	Scuol Zernez, Samnaun, Val Müstair	Mountain	0% 20% 40% 60% 80% 100%
spontaneously and short notice planning	53.3%	49.7%	
far in advance planning	46.7%	50.3%	
n=	914	12'659	

Travel habits: information via internet	Scuol Zernez, Samnaun, Val Müstair	Mountain	0% 20% 40% 60% 80% 100%
travel offers on the internet	86.3%	85.8%	
travel offers outside the internet	13.7%	14.2%	
n=	914	12'657	

Travel habits: directly vs. not directly	Scuol Zernez, Samnaun, Val Müstair	Mountain	0% 20% 40% 60% 80% 100%
booking directly at accommodation	73.3%	59.5%	
booking accommodation via intermediary	19.0%↓↓	30.6%	
unpaid accommodation (own accommodation, with family/friends)	7.7%	9.9%	
n=	914	12'657	

Travel habits: familiar vs. new places	Scuol Zernez, Samnaun, Val Müstair	Mountain	0% 20% 40% 60% 80% 100%
visiting new places	54.9%	63.9%	
visiting familiar places	45.1%	36.1%	
n=	914	12'666	

Travel habits: price segment	Scuol Zernez, Samnaun, Val Müstair	Mountain	0% 20% 40% 60% 80% 100%
low price segment	16.3%	17.0%	
mid price segment	74.7%	71.6%	
high price segment	9.0%	11.4%	
n=	914	12'659	

Travel habits: number of holidays per year	Scuol Zernez, Samnaun, Val Müstair	Mountain	0% 20% 40% 60% 80% 100%
two to three holidays per year	67.2%	61.7%	
four or more holidays per year	22.6%	23.7%	
one holiday per year	10.2%↓	14.6%	
n=	914	12'660	

Travel habits: socializing	Scuol Zernez, Samnaun, Val Müstair	Mountain	0% 20% 40% 60% 80% 100%
no need for making new contacts during holiday	75.3%	72.3%	
enjoy making new contacts during holiday	24.7%	27.7%	
n=	914	12'660	

Sources of Information and Travel Decision

Information sources for choosing vacation in Switzerland: aggregated to type. Degree of influence	Scuol Zernez, Samnaun, Val Müstair	Mountain	0% 20% 40% 60% 80% 100%
tourism-related internet site/app	19.2%	20.4%	
personal 1-to-1 communication (private or business)	14.4%	14.0%	
online rating/booking platform/discussion forum	6.0%	7.6%	
map	3.9%	3.4%	
catalogue/brochure/magazine	3.5%	3.0%	
newspaper/magazine/news portal	2.8%	2.0%	
social media/video/image platform (private or business)	2.6%↓↓	8.2%	
online newsletter	1.7%	1.1%	
travel guide	1.2%	1.4%	
TV/radio/cinema	0.5%	0.7%	
event/fair	0.4%	0.4%	
poster	0.1%	0.2%	
other	1.6%	1.6%	
n=	710	10'176	

Information sources for choosing vacation in Switzerland: Degree of influence, top 20 out of a total of 74	Scuol Zernez, Samnaun, Val Müstair	Mountain	0% 20% 40% 60% 80% 100%
people in the tourist's private circle: from person to person	12.0%	11.6%	
internet site/app from local/ regional tourism organization	8.6%	6.8%	
online ratings/booking platforms/discussion forums	6.0%	7.6%	
internet site/app from national tourism organization "Switzerland Tourism"	3.5%	4.4%	
internet site/app from accommodation	2.9%	3.0%	
digital map	2.8%	2.6%	
internet site/app from local provider of excursions/activities/attractions	1.6%	2.0%	
internet site/app from transport companies (only arrival and departure)	1.4%	1.9%	
independent report in newspaper/magazine/news portal	1.3%	0.7%	
internet site/app from tour operator/travel provider/travel agent	1.3%	2.4%	
travel guide	1.2%	1.4%	
people in the tourist's private circle on social media, video, image platform	1.2%	2.7%	
printed map	1.1%	0.8%	
newsletter from accommodation	0.9%	0.3%	
personal information from accommodation	0.9%	0.8%	
catalogues/brochures/magazines from local/regional tourism organization	0.9%	0.7%	
catalogues/brochures/magazines from accommodation	0.6%	0.4%	
personal information directly from local provider of excursions/activities/attractions	0.5%	0.4%	
catalogues/brochures/magazines directly from local provider of excursions/activities/attractions	0.5%	0.4%	
other	2.8%	2.5%	
n=	710	10'176	

Decisive factor when choosing an accommodation	Scuol Zernez, Samnaun, Val Müstair	Mountain	0% 20% 40% 60% 80% 100%
destination more decisive	58.1%	61.6%	
accommodation more decisive	26.3%	25.8%	
destination and accommodation equally decisive	15.6%	12.6%	
n=	942	13'089	

Journey Characteristics

Location of holiday: tourism zone	Scuol Zernez, Samnaun, Val Müstair	Mountain	0% 20% 40% 60% 80% 100%
mountain	100.0%	100.0%	
countryside	0.0%	0.0%	
small town	0.0%	0.0%	
big city	0.0%	0.0%	
n=	941	13'089	

Location of holiday: tourism region	Scuol Zernez, Samnaun, Val Müstair	Mountain	0% 20% 40% 60% 80% 100%
Graubünden	100.0%↑↑↑	31.0%	
Valais	0.0%	24.6%	
Bern Region	0.0%	23.0%	
Lucerne - Lake Lucerne Region	0.0%	13.2%	
Eastern Switzerland	0.0%	3.3%	
Canton of Vaud	0.0%	2.6%	
Ticino	0.0%	1.5%	
Region of Fribourg	0.0%	0.5%	
Zurich Region	0.0%	0.2%	
Aargau - Solothurn Region	0.0%	0.0%	
Jura & Three-Lakes	0.0%	0.0%	
Basel Region	0.0%	0.0%	
Geneva	0.0%	0.0%	
n=	941	13'089	

Package tour: bundling of travel to and from the destination, accommodation and/or other tourist services at the destination	Scuol Zernez, Samnaun, Val Müstair	Mountain	0% 20% 40% 60% 80% 100%
no package tour	91.9%	89.6%	
package tour	8.1%	10.4%	
n=	942	13'089	

Season: 2 categories	Scuol Zernez, Samnaun, Val Müstair	Mountain	0% 20% 40% 60% 80% 100%
winter (November-April)	50.6%	46.4%	
summer (May-October)	49.4%	53.6%	
n=	939	13'007	

Accommodation	Scuol Zernez, Samnaun, Val Müstair	Mountain	0% 20% 40% 60% 80% 100%
hotel/health establishment	41.1%	40.9%	
rented apartment/house	30.0%	25.4%	
campsite	9.7%↑↑	5.9%	
unpaid apartment/house	7.8%↓↓	13.6%	
serviced apart./chalets/villas	3.3%	4.7%	
bed & breakfast	3.2%	2.9%	
youth hostel/hostel	2.2%	3.1%	
group accommodation	1.4%	1.8%	
mountain hut/SAC	0.9%	1.3%	
agritourism (on a farm)	0.2%	0.2%	
other	0.1%	0.2%	
n=	919	12'505	

Star category of hotel / health establishment	Scuol Zernez, Samnaun, Val Müstair	Mountain	0% 20% 40% 60% 80% 100%
*	0.0%	0.1%	
**	2.3%	3.2%	
***	52.5%	41.6%	
****	28.9%	38.2%	
*****	4.7%↓↓	8.8%	
no category	5.5%	4.6%	
different classification	1.0%	0.3%	
not known	5.0%	3.3%	
n=	368	4'707	

Size of travel group	Scuol Zernez, Samnaun, Val Müstair	Mountain	0% 20% 40% 60% 80% 100%
1 person	7.6%	9.8%	
2 persons	42.9%	40.4%	
3-5 persons	36.3%	36.5%	
6-9 persons	10.6%	9.9%	
10+ persons	2.6%	3.3%	
n=	910	12'458	

Travel community	Scuol Zernez, Samnaun, Val Müstair	Mountain	0% 20% 40% 60% 80% 100%
with partner	73.4%	71.9%	
with other family members (including children with age 18+)	28.6%	28.2%	
with friends/acquaintances	27.8%	27.1%	
with children (below 18 years)	26.4%	30.6%	
alone	7.8%	9.8%	
with dog	6.7%	5.9%	
in a group that includes people I don't know	3.3%	4.6%	
with other pet	1.0%	1.3%	
n=	942	13'089	

Travelling with children (<18 years)	Scuol Zernez, Samnaun, Val Müstair	Mountain
no	73.6%	69.4%
yes	26.4%	30.6%
n=	*942*	*13'089*
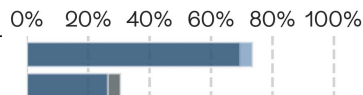
Number of children travelling with (<18 years)	Scuol Zernez, Samnaun, Val Müstair	Mountain
no child	73.6%	69.4%
1 child	8.2%	9.4%
2 children	12.6%	14.3%
3 children	3.7%	3.9%
4 children	1.1%	1.8%
5 children	0.3%	0.6%
6+ children	0.5%	0.6%
n=	*942*	*13'089*
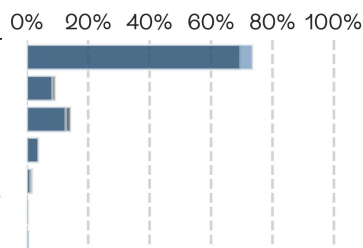
Travelling with children (age)	Scuol Zernez, Samnaun, Val Müstair	Mountain
Travelling with children (0-5 years)	9.1%↓	13.3%
Travelling with children (6-12 years)	15.9%	19.1%
Travelling with children (13-17 years)	8.9%	9.4%
n=	*942*	*13'089*
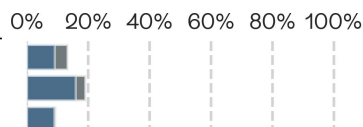
Multi-generation travel	Scuol Zernez, Samnaun, Val Müstair	Mountain
no	95.1%	93.3%
yes	4.9%	6.7%
n=	*942*	*13'089*
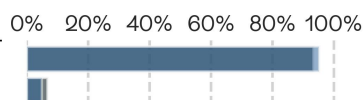
Means of transport crossing the Swiss border	Scuol Zernez, Samnaun, Val Müstair	Mountain
car	75.8%↑↑	40.2%
train	9.2%↓↓↓	19.8%
plane	5.4%↓↓↓	30.9%
camper van / caravan	5.2%	3.4%
private coach for an extra trip (e.g. for group travel)	1.5%	3.1%
tram / public bus	1.2%	0.7%
long-distance bus through Europe (regular scheduled service)	0.0%	1.3%
motorcycle	0.0%	0.2%
other	1.6%	0.6%
n=	*259*	*6'532*
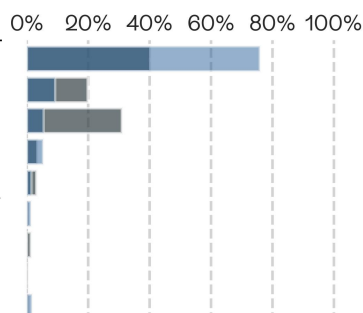
Main means of transport within Switzerland	Scuol Zernez, Samnaun, Val Müstair	Mountain	0% 20% 40% 60% 80% 100%
car	53.2%	52.8%	
train	32.5%	36.8%	
tram / public bus	5.9%	4.5%	
camper van / caravan	5.2%↑↑	2.6%	
private coach for an extra trip (e.g. for group travel)	0.7%	1.5%	
motorcycle	0.2%	0.2%	
plane	0.1%	0.1%	
long-distance bus through Europe (regular scheduled service)	0.0%	0.2%	
other	2.2%	1.3%	
n=	931	12'936	

Touring within Switzerland	Scuol Zernez, Samnaun, Val Müstair	Mountain	0% 20% 40% 60% 80% 100%
non-touring (1 destination)	80.5%	72.6%	
touring (2+ destinations)	19.5%↓	27.4%	
n=	942	13'089	

Touring within Switzerland and/or Europe	Scuol Zernez, Samnaun, Val Müstair	Mountain	0% 20% 40% 60% 80% 100%
no: 1 CH destination	77.2%	69.6%	
yes: multiple CH destinations	16.7%	19.6%	
yes: multiple CH destination & destination(s) abroad	2.8%↓↓↓	7.9%	
yes: 1 CH destination & destination(s) abroad	3.2%	2.9%	
n=	942	13'089	

Travel Motivations

Type of holiday	Scuol Zernez, Samnaun, Val Müstair	Mountain	0% 20% 40% 60% 80% 100%
active winter holidays (focused on physical exercise/sports)	39.9%↑	27.1%	
active summer holidays (focused on physical exercise/sports)	25.8%↑	19.6%	
pleasure summer holidays (focused on rest, relaxation, and nature)	14.5%	12.9%	
family holidays	7.1%↓↓	10.8%	
pleasure winter holidays (focused on rest, relaxation, and nature)	6.8%	6.8%	
sightseeing holidays	2.3%↓↓↓	14.1%	
spa and wellness holidays	1.3%	2.9%	
cultural holidays	1.0%	1.5%	
city holidays	0.3%	1.8%	
luxury holidays	0.0%	0.8%	
none of these	1.0%	1.7%	
n=	942	13'089	

Most important criteria when deciding to travel to Switzerland (travel drivers): MULTIPLE CHOICE	Scuol Zernez, Samnaun, Val Müstair	Mountain	0% 20% 40% 60% 80% 100%
mountains	64.8%	63.6%	
nature	58.5%	53.3%	
active holidays/sports	52.1%↑	39.6%	
hospitality	33.6%↑	23.5%	
good catering/food	33.1%	26.1%	
snow/glaciers	31.9%	30.9%	
good value for money	28.9%	24.1%	
good public transport (general)	23.4%	21.9%	
panorama	20.7%↓	27.6%	
family-friendliness	16.9%	18.7%	
pleasant climate/weather	16.1%	18.6%	
good accessibility	15.8%	16.2%	
sustainability	15.2%↑↑	9.0%	
lakes/rivers	14.4%↓↓	23.8%	
atmosphere	12.7%	13.3%	
reliable service at destination	12.7%	11.8%	
high quality standards	11.0%	11.6%	
maximum relaxation	10.1%	9.0%	
short distances for experiences	9.8%	9.5%	
convenient travel options	9.4%	8.8%	
safety at destination	6.7%↓↓	11.3%	
authenticity	6.6%	6.3%	
exceptional accommodation	6.3%	5.6%	
high variety of experiences	5.8%↓↓	9.0%	
adventure	5.6%↓↓	8.9%	
mountain pass roads	4.4%	5.0%	
traditions	4.2%	4.7%	
art & culture	4.0%	4.3%	
entertainment/fun	3.0%↓↓	5.8%	
shopping	2.8%	1.8%	
historical experiences	2.1%	2.8%	
round trip/road trip/touring	1.6%↓↓↓	3.7%	
luxury	1.3%	2.5%	
city experiences	1.1%↓↓↓	4.3%	
evening programme/nightlife	0.5%	1.3%	
other	2.4%	1.9%	
n=	942	13'087	

Most important criterion when deciding to travel to Switzerland (travel driver): SINGLE CHOICE	Scuol Zernez, Samnaun, Val Müstair	Mountain	0% 20% 40% 60% 80% 100%
active holidays/sports	20.1%↑	14.5%	
mountains	17.9%	20.1%	
nature	13.9%	11.8%	
snow/glaciers	9.3%	9.4%	
good value for money	7.1%	5.6%	
hospitality	4.5%↑↑↑	2.0%	
family-friendliness	4.4%↓↓	7.1%	
maximum relaxation	2.9%	2.2%	
good public transport (general)	2.2%	2.7%	
good catering/food	1.8%	1.4%	
pleasant climate/weather	1.6%	1.9%	
panorama	1.5%	3.4%	
exceptional accommodation	1.4%	1.1%	
atmosphere	1.3%	1.4%	
high quality standards	1.0%	1.1%	
short distances for experiences	1.0%	1.1%	
convenient travel options	0.9%	0.6%	
good accessibility	0.8%	1.0%	
high variety of experiences	0.8%	1.7%	
sustainability	0.7%	0.4%	
reliable service at destination	0.5%	0.7%	
authenticity	0.4%	0.5%	
safety at destination	0.4%	0.7%	
round trip/road trip/touring	0.3%	0.9%	
art & culture	0.3%	0.4%	
mountain pass roads	0.2%	0.4%	
adventure	0.2%	1.0%	
entertainment/fun	0.2%	0.5%	
evening programme/nightlife	0.2%	0.1%	
traditions	0.2%	0.4%	
city experiences	0.1%	0.4%	
historical experiences	0.1%	0.2%	
lakes/rivers	0.1%	1.7%	
luxury	0.1%	0.3%	
shopping	0.0%	0.0%	
other	1.7%	1.4%	
n=	936	13'029	

Destination Brand, Satisfaction and Customer Loyalty

Touristic strengths	Scuol Zernez, Samnaun, Val Müstair	Mountain	0% 20% 40% 60% 80% 100%
nature	26.1%↑	18.4%	
winter sports	24.4%	20.2%	
rest/relaxation	22.1%↑	15.2%	
friendliness/hospitality	21.0%↑↑	11.4%	
gastronomy	16.2%	15.3%	
panorama/scenery/landscape	15.2%↓↓	23.2%	
hiking	15.1%	14.8%	
mountains	14.2%↓	20.4%	
shopping opportunities	13.8%↑↑↑	5.5%	
public transportation	13.5%	13.0%	
accommodation	12.6%	11.5%	
location	12.3%	10.2%	
sports opportunities	10.3%	8.0%	
snow (conditions)	9.7%	7.6%	
nature attractions	9.5%↑↑↑	3.2%	
easy to reach from place of residence	9.2%↓	12.7%	
centrally located for day trips	8.4%	10.4%	
price-performance ratio	8.1%↑↑↑	4.0%	
small size/compactness	7.4%	5.8%	
spa/wellness	7.3%↑↑	3.8%	
family friendliness	7.2%	8.1%	
few tourists/not crowded	6.7%↑↑↑	3.2%	
climate/weather	6.4%	5.4%	
range of services/variety	6.4%↓↓	10.5%	
beauty	6.3%↓	9.2%	
special offers/guest card	6.0%↑↑↑	3.0%	
authenticity	5.2%↑↑	3.1%	
village character	4.8%	4.0%	
mountain railways	4.6%	6.3%	
infrastructure	3.9%	4.4%	
quality/reliability	3.6%	3.4%	
history	3.5%	1.8%	
art/culture	3.1%	1.8%	
architecture	2.8%	1.4%	
cleanliness	2.2%	3.7%	
tradition	1.5%	1.3%	
atmosphere	1.1%	2.3%	
safety	0.8%	1.2%	
old town	0.7%	0.5%	
traffic-free/low traffic	0.6%↓↓↓	3.9%	
touristic attractions	0.6%	1.7%	
water (lakes, rivers, waterfalls)	0.5%↓↓↓	10.1%	
museums/galleries	0.5%	0.3%	
festivals/theatres/events	0.3%	0.7%	
nightlife	0.2%	1.0%	
exclusiveness/prestige	0.1%	1.1%	
convenience/comfort	0.0%	1.2%	
international flair	0.0%	0.4%	
other	9.8%	10.8%	
n=	907	12'522	

Touristic weaknesses	Scuol Zernez, Samnaun, Val Müstair	Mountain	0% 20% 40% 60% 80% 100%
difficult to reach/remote	28.9%↑↑↑	10.9%	
expensive	19.1%↓↓	37.6%	
gastronomy/dining	15.1%	13.5%	
public transportation	9.3%	7.6%	
wintersport options/snow conditions	9.1%	8.2%	
does not offer enough/too small	8.5%↑↑	5.3%	
not enough stores/shopping	7.3%	5.9%	
too much traffic	5.7%	4.4%	
accommodation	5.4%	6.8%	
lack of infrastructure (general)	3.6%	4.7%	
other sports offers	3.6%	2.4%	
too many tourists/too touristy	3.4%↓↓↓	9.6%	
climate/weather	3.4%	3.5%	
not enough nightlife	3.0%	3.2%	
unfriendly/not hospitable	2.1%	2.1%	
mountain railways	2.1%	3.9%	
not beautiful	2.0%	3.2%	
lack of signage/information	1.7%	2.1%	
opening hours of tourism office, stores...	1.7%	2.1%	
noisy/chaotic/hectic	1.5%	1.2%	
overbuilt	1.5%	1.5%	
place is dying/cold beds/closed	1.3%	1.8%	
lack of guest card benefits	1.3%	0.4%	
not enough bad weather options	1.1%	0.7%	
not family-friendly	1.0%	1.6%	
not enough parking	0.9%	1.7%	
dirty/unsave	0.5%	0.8%	
not enough art/culture/museums	0.3%	0.7%	
too luxurious/posh	0.3%	1.2%	
spa & wellness	0.3%	0.7%	
foreign language skills/translations	0.0%	1.0%	
other	9.2%	11.9%	
n=	643	9'468	

Brand image of visited destination	Scuol Zernez, Samnaun, Val Müstair	Mountain	0% 20% 40% 60% 80% 100%
mountains	64.2%	64.3%	
nature	55.4%	49.1%	
active holidays/sports	52.0%	40.3%	
hospitality	38.4%↑↑	22.7%	
good catering/food	31.1%↑	21.4%	
panorama	28.7%↓	38.8%	
good public transport (general)	22.9%	23.3%	
snow/glaciers	22.8%	28.7%	
good value for money	22.4%↑↑	11.4%	
pleasant climate/weather	17.3%	16.9%	
family-friendliness	17.0%	20.0%	
atmosphere	16.5%	16.1%	
maximum relaxation	13.4%	12.1%	
reliable service at destination	12.9%↑	9.4%	
authenticity	12.5%↑	9.4%	
good accessibility	10.7%↓↓	19.4%	
shopping	10.4%↑↑↑	2.9%	
high quality standards	8.9%	8.7%	
mountain pass roads	7.7%↑↑	4.9%	
traditions	7.3%	5.8%	
exceptional accommodation	7.3%	5.4%	
sustainability	7.0%↑↑↑	3.4%	
safety at destination	6.8%↓↓	10.4%	
high variety of experiences	6.5%↓	8.9%	
short distances for experiences	5.8%↓↓↓	11.7%	
lakes/rivers	5.6%↓↓↓	19.7%	
historical experiences	5.6%↑↑↑	2.2%	
convenient travel options	5.1%↓	7.6%	
art & culture	2.8%	1.8%	
adventure	2.6%↓↓↓	6.8%	
luxury	1.6%↓↓↓	4.1%	
round trip/road trip/touring	1.0%	3.0%	
entertainment/fun	1.0%↓↓↓	4.5%	
evening programme/nightlife	0.1%	1.4%	
city experiences	0.0%	1.4%	
other	0.0%	0.0%	
n=	919	12'765	

Satisfaction with destination [0-100]	Scuol Zernez, Samnaun, Val Müstair	Mountain	0 20 40 60 80 100
mean	90.3	87.6	
n=	925	12'807	

Recommendation of destination (Net Promoter Score NPS)	Scuol Zernez, Samnaun, Val Müstair	Mountain	−100 −50 0 50 100
nps	69	61	
n=	924	12'804	

Recommendation of destination: promoters vs. detractors	Scuol Zernez, Samnaun, Val Müstair	Mountain	0% 20% 40% 60% 80% 100%
promoters	75.3%	68.5%	
passives	18.4%	23.7%	
detractors	6.2%	7.9%	
n=	*924*	*12'804*	

Frequency visiting Switzerland	Scuol Zernez, Samnaun, Val Müstair	Mountain	0% 20% 40% 60% 80% 100%
once	3.5%↓↓↓	15.4%	
2-5 times	9.7%↓↓	14.8%	
more than 5 times	86.9%	69.8%	
n=	*942*	*13'052*	

Frequency visiting the destination	Scuol Zernez, Samnaun, Val Müstair	Mountain	0% 20% 40% 60% 80% 100%
once	36.5%	47.0%	
2-5 times	27.7%	24.1%	
more than 5 times	35.8%	28.9%	
n=	*942*	*13'055*	

Best alternative to destination visited in Switzerland. (Top 20)	Scuol Zernez, Samnaun, Val Müstair	Mountain	0% 20% 40% 60% 80% 100%
Tyrol	21.7%↑↑	12.3%	
Graubünden	18.8%↑↑	10.6%	
Autonomous Region of Trentino-Alto Adige	10.0%↑↑↑	4.0%	
Valais	6.7%	7.5%	
Vorarlberg	6.1%	5.7%	
Bern	3.4%	3.7%	
Auvergne-Rhône-Alpes	2.1%↓↓	4.1%	
Lombardy	1.9%	1.5%	
Bavaria	1.5%	2.0%	
Ticino	1.4%	1.4%	
Provence-Alpes-Côte d'Azur	1.4%	2.7%	
Piedmont	1.2%	1.4%	
Mecklenburg-Western Pomerania	1.2%	0.2%	
Carinthia	1.1%	0.6%	
Liguria	0.8%	0.6%	
Tuscany	0.7%↓↓↓	2.8%	
British Columbia	0.7%	0.7%	
Nordland	0.7%	0.4%	
Baden-Württemberg	0.7%	1.1%	
Sicily	0.6%	0.6%	
n=	*416*	*5'922*	

Legend

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.

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