

STV  **FST**

Schweizer Tourismus-Verband
Fédération suisse du tourisme
Federazione svizzera del turismo
Federaziun svizra dal turissem

SWISS TOURISM IN FIGURES 2014

STRUCTURE AND INDUSTRY DATA

PARTNERSHIP. POLITICS. QUALITY.



QUALITY
Our Passion



FAMILY
Destination



WELLNESS
Destination



APARTMENT
Holiday Comfort

Edited by

Swiss Tourism Federation (STF)

In cooperation with

GastroSuisse | Public Transport Association | Swiss Cableways | Swiss Federal Statistical Office (SFSO) | Swiss Hiking Trail Federation | Switzerland Tourism (ST) | SwitzerlandMobility

Imprint

Production: Béatrice Herrmann, STF | Photo: Boris Baldinger | Print: Länggass Druck AG, 3000 Bern

The data in this publication is the latest available. The publication is also obtainable on www.swisstourfed.ch.
Bern, July 2015

CONTENTS

AT A GLANCE	4
LEGAL BASES	5
TOURIST REGIONS	7
TOURISM – AN IMPORTANT SECTOR OF THE ECONOMY	8
TRAVEL BEHAVIOUR OF THE SWISS RESIDENT POPULATION	14
ACCOMMODATION SECTOR	16
HOTEL AND RESTAURANT INDUSTRY	29
TOURISM INFRASTRUCTURE	34
FORMAL EDUCATION	47
INTERNATIONAL	49
QUALITY PROMOTION	51
TOURISM ASSOCIATIONS AND INSTITUTIONS	55

AT A GLANCE

CHF 38.5 billion¹

total revenue generated by Swiss tourism

28 382 km public transportation network
28 777 train stations and stops

47 500 843 air passengers
454 837 flights

CHF 16.2 billion¹

gross value added

28 855 restaurants
8676 trainees

CHF 16.0 billion¹

revenue from foreign tourists in Switzerland

CHF 15.0 billion
outlays by Swiss tourists abroad

167 590 full-time equivalents¹

209 800 employees in tourism

35 933 512 hotel overnight stays
average stay = 2,1 nights

5129 hotels and health resorts

272 636 hotel beds

One of the largest export industries in Switzerland
4,6% of export revenue

¹ Swiss Federal Statistical Office, Annual indicators of the Tourism Satellite Account TSA 2013 (estimates)

Source: Swiss Federal Statistical Office, LITRA Public transport information service, Federal Office of Civil Aviation, GastroSuisse

LEGAL BASES

NATIONAL TOURISM LAWS

MARKETING SWITZERLAND AS A TOURIST DESTINATION

Federal Act on Switzerland Tourism of 21 December 1955, Status as of 1 August 2008 (SR 935.21)

PROMOTION OF INNOVATION, COOPERATION AND KNOWLEDGE CREATION IN TOURISM

Federal Act on the Promotion of Innovation, Cooperation and Knowledge Creation in Tourism of 30 September 2011, Status as of 1 February 2012 (SR 935.22)

PROMOTION OF THE HOTEL INDUSTRY

Federal Act on the Promotion of the Hotel Industry of 20 June 2003,
Status as of 1 January 2013 (SR 935.12)

REGIONAL POLICY

Federal Act on Regional Policy of 6 October 2006, Status as of 1 January 2013 (SR 901.0)

CASINOS

Federal Act on Gambling and Gambling Casinos of 18 December 1998,
Status as of 27 December 2006 (SR 935.52)

TEMPORARY SPECIAL RATE FOR ACCOMMODATION SERVICES

Federal Act on Value Added Tax of 12 June 2009, Status as of 1 January 2014 (SR 641.20)

TOURISM STATISTICS

Ordinance on the Conduct of Federal Statistical Surveys of 30 June 1993,
Status as of 15 December 2014 (SR 431.012.1)

NATURE PARKS

Federal Act on the Protection of Nature and Cultural Heritage of 1 July 1966,
Status as of 12 October 2014 (SR 451)

CABLECARS AND CHAIRLIFTS

Federal Act on Cableways for Passenger Transport of 23 June 2006, Status as of 1 July 2013 (SR 743.01)

CANTONAL TOURISM LAWS

Canton	Internet	Law
Aargau	www.ag.ch	Location Development Act of 1 January 2010
Appenzell Innerrhoden	www.ai.ch	Promotion of Tourism Act of 25 April 1999
Appenzell Ausserrhoden	www.ar.ch	Tourism Act of 25 April 1976
Basel-Landschaft	www.bl.ch	Tourism Act of 19 June 2003
Basel-Stadt	www.bs.ch	Location Development Act of 29 June 2006
Bern	www.be.ch	Tourism Development Act of 20 June 2005
Fribourg	www.fr.ch	Tourism Act of 13 October 2005
Geneva	www.ge.ch	Tourism Act of 24 June 1993
Glarus	www.gl.ch	Tourism Development Act of 6 May 2007
Graubünden	www.gr.ch	Economic Development Act of 11 February 2004
Jura	www.jura.ch	Tourism Act of 31 May 1990
Lucerne	www.lu.ch	Tourism Act of 30 January 1996
Neuchâtel	www.ne.ch	Law to support the development of tourism (L'Tour) of 18 February 2014
Nidwalden	www.nw.ch	Tourism Act of 25 April 1971
Obwalden	www.ow.ch	Tourism Act of 3 May 2012
St. Gallen	www.sg.ch	Tourism Act of 26 November 1995
Schaffhausen	www.sh.ch	Law on Contributions to the Cantonal Tourism Organisation of 16 June 2008
Solothurn	www.so.ch	No tourism law
Schwyz	www.sz.ch	Law on Economic Development of 27 November 1986
Thurgau	www.tg.ch	Law on Actions against Unemployment and for Location Development of 28 November 1988
Ticino	www.ti.ch	Tourism Act of 25 June 2014
Uri	www.ur.ch	Tourism Promotion Act of 23 September 2012
Vaud	www.vd.ch	Promotion of Tourism Act of 12 June 2007
Valais	www.vs.ch	Tourism Act of 9 February 1996
Zug	www.zg.ch	Tourism Act of 27 March 2003
Zurich	www.zh.ch	No tourism law

TOURIST REGIONS



© Swiss Federal Statistical Office, ThemaKart
As of 2014¹

- 1 **Graubünden:** Canton of Graubünden.

- 2 **Eastern Switzerland:** Cantons of Glarus, Appenzell Ausserrhoden, Appenzell Innerrhoden, Thurgau, Schaffhausen (excluding parts of the district of Schaffhausen) and St. Gallen (excluding parts of the district of See-Gaster).

- 3 **Zurich Region:** Cantons of Zurich, of Zug; Canton of Aargau: parts of the districts of Baden, Bremgarten and Zurzach; Canton of Schwyz: district of Höfe and part of district of March; Canton of St. Gallen: parts of See-Gaster district; Canton of Schaffhausen: part of district Schaffhausen.

- 4 **Lucerne / Lake Lucerne:** Cantons of Luzern, Uri, Obwalden and Nidwalden; Canton of Schwyz (excluding the district of Höfe and parts of the district of March); Canton of Aargau: district Muri, parts of Kulm and Lenzburg districts.

- 5 **Basel Region:** Cantons of Basel-Stadt and Basel-Landschaft; Canton of Solothurn: districts Dorneck and Thierstein, parts of districts Thal and Gösgen; Canton of Aargau: districts Laufenburg, Rheinfelden, parts of districts of Zurzach, Aarau and Brugg.

- 6 **Bern Region:** Canton of Bern: districts of Emmental, Oberaargau, Bern-Mittelland, parts of districts of Seeland and of Thun; Canton of Solothurn: districts of Olten, Gäu, parts of district of Gösgen; canton Aargau: district of Zofingen, parts of district Aarau, Baden, Brugg, Bremgarten, Kulm and Lenzburg.

- 7 **Bernese Oberland:** Canton of Bern: districts of Frutigen-Niedersimmental, Interlaken-Oberhasli, Obersimmental-Saanen, part of the district of Thun.

- 8 **Jura & Three-Lakes:** Cantons of Neuchâtel, Jura; Canton of Bern: districts of Bernese Jura, Biel/Bienne, part of Seeland; canton of Solothurn: district of Solothurn, Bucheggberg, Lebern, part of the districts of Thal and Wasseramt.

- 9 **Lake Geneva Region (Vaud):** Canton of Vaud.

- 10 **Geneva:** Canton of Geneva.

- 11 **Valais:** Canton of Valais.

- 12 **Ticino:** Canton of Ticino.

- 13 **Fribourg Region:** Canton of Fribourg.

¹ From 1.1.2015 Switzerland is divided into 14 tourism regions: a new feature is Aargau Region.

TOURISM – AN IMPORTANT SECTOR OF THE ECONOMY

Domestic and international tourism are important factors in the Swiss economy. Of a total revenue of CHF 38.5 billion in 2013, 19.8 billion or almost 51.4 % came from tourist accommodation, meals or transportation. These three tourism products are responsible for 65.6 % of the total value added from tourism.

TOURISM – AN INVISIBLE EXPORT

The expenditure of foreign guests in Switzerland has the same effect on the Swiss balance of payments as the export of goods and services. In 2013, approximately 4.6 % of Switzerland's export revenue (goods without nonmonetary gold and services) come from tourism.¹

EXPORT REVENUE

Industry	2014 CHF bn	2013 CHF bn	2012 CHF bn	2011 CHF bn	2010 CHF bn
Chemical industry	85.3	80.9	79.0	74.6	75.9
Metal and machine industry	60.5	60.0	59.4	64.0	63.6
Merchanting	25.2	23.4	26.7	27.6	27.7
Watchmaking industry	22.3	21.8	21.4	19.3	16.2
Financial services	20.3	22.4	21.8	21.9	24.0
Tourism (Tourism Balance of Payments)	16.0	15.6	15.1	15.2	15.4

¹ The tourism figures in the table above are based on the Tourism Balance of Payments. For system-related reasons, however, they differ slightly from the values in the Tourism Satellite Account. The Tourism Balance of Payments, for instance, also reports expenditure by foreign cross-border commuters and short-stay residents, foreign students at Swiss private schools and foreign students at Swiss colleges and universities, which are not included in the Tourism Satellite Account. On the other hand, the Tourism Balance of Payments does not include purchases of tickets (air travel and international rail tickets) from Swiss transportation enterprises made by foreign visitors abroad. Source: Swiss Federal Statistical Office, «Monthly Statistical Bulletin Mai 2015» of the Swiss National Bank (SNB)

TOURISM BALANCE OF PAYMENTS

LARGEST SHARE OF INCOME FROM TRAVEL WITH OVERNIGHT STAYS

Switzerland's income and expenditures related to travel are reflected in the Tourism Balance of Payments. On the assets side, it reports Switzerland's income from travel by foreign visitors in Switzerland, and on the liabilities side, it shows expenditure by the resident Swiss population while abroad. For system-related reasons, the figures in the Tourism Balance of Payments differ slightly from the values in the Tourism Satellite Account. See footnote 1 on the previous page regarding this point.

The largest proportion of income comes from trips with overnight stays by foreign visitors. Of this income, revenue from clients of accommodation establishments is largely dominant over revenue from educational and hospital stays.

The Tourism Balance of Payments is based on numerous data sources including surveys of visitors and households as well as accommodation statistics.

TOURISM BALANCE OF PAYMENTS

Revenue / Expenditure in billion CHF	Revenue from foreign tourists			Expenditure of Swiss tourists abroad		
	2014 ²	2013 ¹	2012 ¹	2014 ²	2013 ¹	2012
Tourism, including overnight stays	10.8	10.7	10.4	11.7	11.0	10.5
Visitors staying in lodging facilities and with relatives	7.6	7.5	7.3			
Educational & medical stays	3.3	3.2	3.1			
Excursionists, transit visitors, other tourism	2.8	2.6	2.5	4.0	4.0	3.7
Consumption expenditure of border workers incl. short-term residents (< 4 months)	2.4	2.3	2.2			
Total	16.0	15.6	15.1	15.7	15.0	14.3

¹ Revised figures

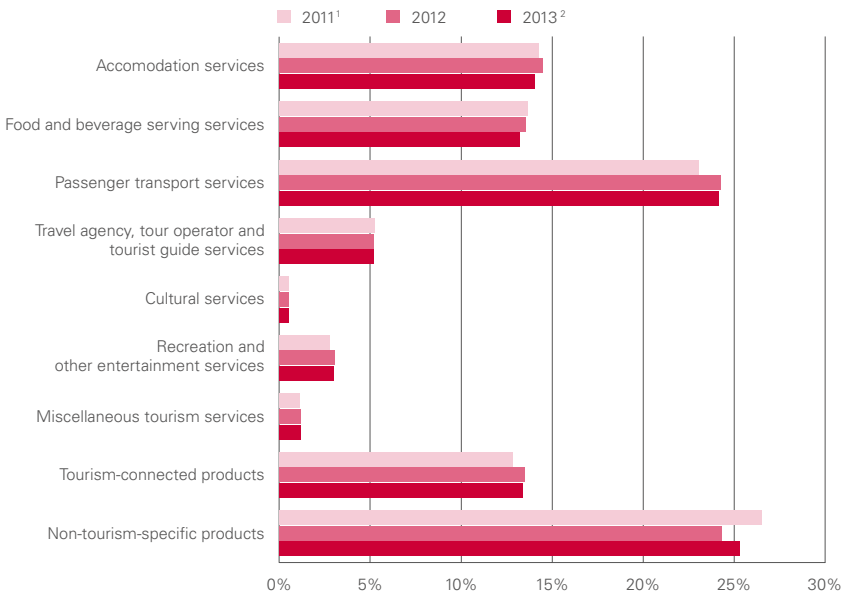
² Provisional figures

Source: Swiss Federal Statistical Office, Tourism balance of payments

THE TOURISM SATELLITE ACCOUNT* INCREASE IN OVERALL TOURISM DEMAND

Overall tourism demand rose considerably again in 2013 (3.5%) after firstly falling in the previous year (2012: -2.4%). A positive development was observed for all products in 2013, leading to an increase in the overall tourism demand to a total of CHF 38.475 billion. The increase in accommodation services (0.4%) and food and beverage serving services (1.0%) remained relatively slight compared with the higher growth among passenger transport services (3.0%), travel agencies (4.1%) and tourism-connected products (2.7%). Growth of non-tourism-specific products even amounted to 7.8%.

SHARES OF THE TOURISM INDUSTRY IN SWITZERLAND



¹ Values from TSA 2011

² First Estimate

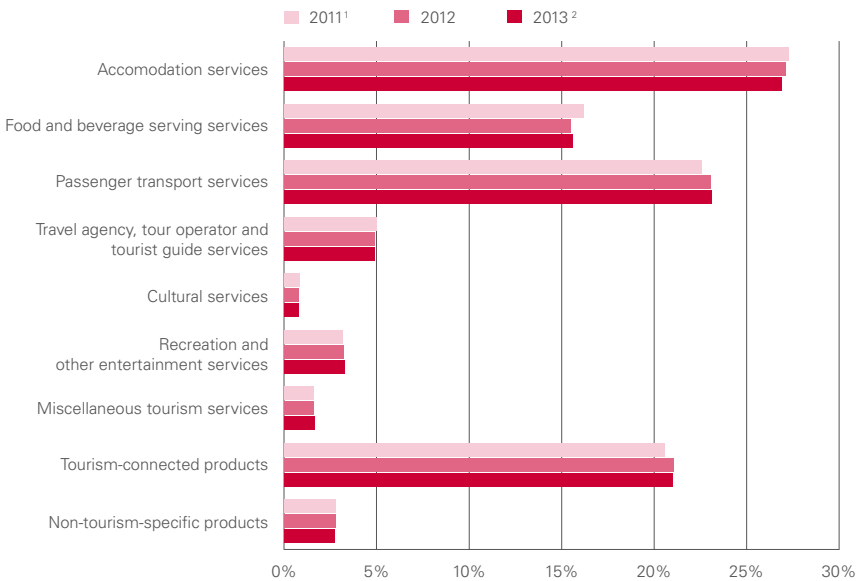
Source: Swiss Federal Statistical Office, TSA 2011 and annual indicators of the Tourism Satellite Account

* The goal of the tourism satellite account is to provide answers on the status and development of tourism in Switzerland from an economic perspective. Three core variables are surveyed: overall tourism demand (i.e. total tourism consumption), gross value added by tourism and tourism employment. The main challenge in capturing the statistics of tourism is that economic statistics are generally supply-oriented. The NOGA division into different industries is based on the goods and services they mainly produce. By contrast, tourism as a cross-sectional sector includes several of these supply-side defined industries like accommodation, restaurant business, transport providers, travel agencies and tour operators to varying degrees. As such, restaurant services are not generally touristic but only insofar as they are actually consumed by tourists. Generally speaking, a good only becomes touristic when being consumed by tourists. Tourism is hence defined by the demand side. The Tourism Satellite Account represents the basic synthesising statistic to measure these economic impacts of tourism.

THE TOURISM SATELLITE ACCOUNT HIGH GROSS VALUE ADDED GROWTH

In 2013, the total gross value added by tourism showed strong growth (2.0%). Overall, this amounted to CHF 16.205 billion. All products recorded positive gross value added trends, with the growth of recreation and other entertainment services registering the biggest increase of 5.1%. The product categories food and beverage serving services (2.5%), passenger transport services (2.3%), and travel agencies (2.2%) registered higher growth overall than accommodation services (1.1%). Growth for tourism-connected products was 1.8% and for non-tourism-specific products 0.7%.

SHARE OF TOURISM GROSS VALUE ADDED ACCORDING TO PRODUCTS



¹ Values from TSA 2011

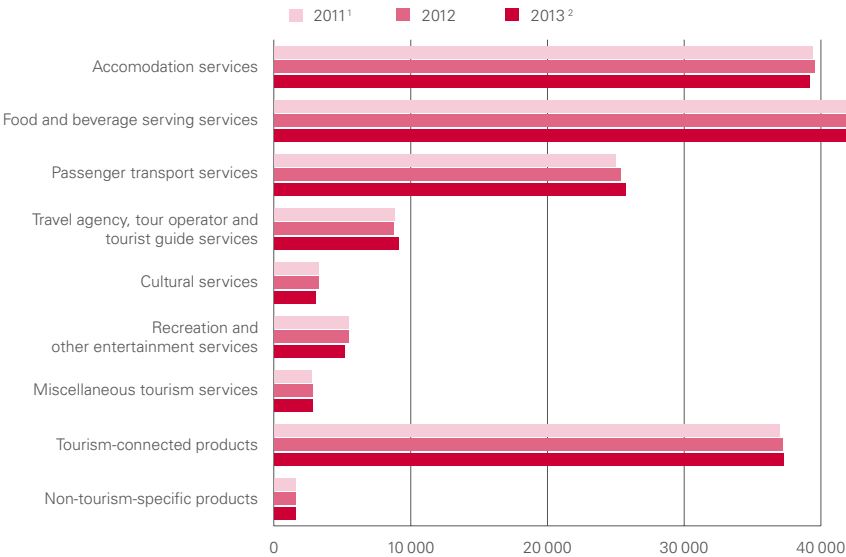
² First Estimate

Source: Swiss Federal Statistical Office, TSA 2011 and annual indicators of the Tourism Satellite Account

THE TOURISM SATELLITE ACCOUNT SLIGHT DECREASE IN TOURISM EMPLOYMENT

Although the overall tourism demand and the gross value added recorded high growth rates, tourism employment in full-time equivalents fell slightly in 2013 (-0.3%) to 167 590 full-time equivalents. A decrease was registered for the products accommodation services (-0.9%), food and beverage serving services (-1.2%), cultural services (-5.3%) and recreation and other entertainment services (-4.8%). Despite the negative employment trend for 2013, positive growth rates were recorded for the products passenger transport services (1.7%) and travel agencies (4.3%).

TOURISM EMPLOYMENT RATE ACCORDING TO PRODUCTS
(IN FULL-TIME EQUIVALENTS)



¹ Values from TSA 2011

² First Estimate

Source: Swiss Federal Statistical Office, TSA 2011 and annual indicators of the Tourism Satellite Account

EMPLOYMENT STATISTIC

TRANSPORT, ACCOMMODATION AND FOOD SERVICE ACTIVITIES

FULL-TIME EQUIVALENTS ACCORDING TO ECONOMIC SECTORS (IN 1000, ANNUAL AVERAGE)

		2014	2013	2012	2011	2010	2009
Service industry	Total	2 574.2	2 549.5	2 501.1	2 447.1	2 413.1	2 390.5
	Men	1 383.9	1 374.1	1 349.0	1 323.7	1 305.0	1 294.2
	Women	1 190.4	1 175.4	1 152.1	1 123.3	1 108.1	1 096.3
Accommodation	Total	61.9	62.4	62.6	64.5	67.3	66.9
	Men	29.6	29.9	29.9	30.8	31.8	31.0
	Women	32.2	32.5	32.8	33.7	35.5	36.0
Food and beverage service activities	Total	106.1	104.7	106.4	109.7	113.4	114.1
	Men	54.8	54.2	54.3	55.8	57.5	56.9
	Women	51.3	50.5	52.1	53.9	56.0	57.2
Land transport and transport via pipelines	Total	97.2	96.4	94.6	91.8	90.2	89.3
	Men	84.2	83.6	82.0	79.9	78.4	78.0
	Women	13	12.8	12.5	11.9	11.7	11.3
Water transport and air transport	Total	13.5	13.4	12.7	11.8	10.6	10.8
	Men	8.4	8.3	7.8	7.2	6.4	6.4
	Women	5.1	5.1	4.8	4.6	4.2	4.4

JOBS STATISTICS: ACCOMMODATION AND FOOD SERVICE ACTIVITIES (IN 1000)

	2014 4 th quarter	2014 3 rd quarter	2014 2 nd quarter	2014 1 st quarter	2013 4 th quarter
Full-time jobs (90% and over)	136.9	137.2	136	137.1	136.6
Men	77.3	76.2	76.2	77.5	76.9
Women	59.6	61	59.9	59.5	59.7
Part-time jobs I (50–89%)	37.8	39.2	39.3	37.4	37.3
Part-time jobs II (<50%)	35.1	34.6	34.7	33.8	34.5
Total number of jobs (overall)	209.8	210.9	210.1	208.2	208.4
Men	94.7	94.2	93.7	94.4	95.6
Women	115.1	116.7	116.4	113.8	112.8

Source: Swiss Federal Statistical Office, Employment statistic

TRAVEL BEHAVIOUR OF THE SWISS RESIDENT POPULATION

In 2013, 87 % of the Swiss resident population¹ undertook at least one trip with one or more overnight stays away from home. The number of trips with overnight stays increased by 9 % compared with 2012. This rise was particularly marked for trips within Switzerland (+17 %). A total of 22.2 million trips were made, of which 8.6 million were within Switzerland. On average 3.0 trips were made per person, of which 1.2 had a domestic destination.

While women and men make about the same number of trips, a comparison between different age groups shows differences in travel behaviour. Whereas people aged 6 to 14 as well as those aged 25 to 44 were the most frequent travellers, taking 3.6 trips per year, people aged 65 or over took an average of 2.1 trips with overnight stays.

NUMBER OF TRIPS (IN 1000)

	2013	2012
Trips with overnight stays	22 217	20 341
Day trips	76 447	71 651

In addition to trips with overnight stays, data on day trips are also collected. The Swiss resident population undertook a total of 76.4 million day trips in 2013, corresponding to an average of 10.5 trips per person. Differences between language regions are observed. People living in the German-speaking part of Switzerland undertook 12.5 day trips, whereas people from the French- or Italian-speaking population made 5.7 and 5.3 trips per year respectively.

NUMBER OF TRIPS (PER PERSON)

	2013	2012
Trips with overnight stays	3.0	2.8
Day trips	10.5	9.9

¹ Swiss resident population aged 6 or over: 7 287 902 persons
Source: Swiss Federal Statistical Office, Travel behaviour 2013

TRAVEL DESTINATIONS

Among the trips with overnight stays recorded in 2013, 39 % had a Swiss destination. 37 % of trips led to countries that border Switzerland, namely Germany (13 %), France (10 %) and Italy (9 %). Finally, 17 % of trips had a destination in other European countries and 7 % outside Europe.

NUMBER OF TRIPS WITH OVERNIGHT STAYS BY DESTINATION (IN 1000)

	2013	2012
Switzerland	8 648	7 417
Germany	2 952	3 053
Austria	981	949
Italy	1 951	2 091
France ¹	2 247	2 042
Southeast Europe ²	933	764
Southwest Europe ³	1 310	1 084
Rest of Europe	1 616	1 396
Rest of the world	1 575	1 544
Unknown	4	0
Total	22 217	20 341

¹ Including overseas departments and Monaco

² Greece, Turkey, Croatia, Bosnia and Herzegovina, Serbia, Albania, Slovenia, Montenegro, Kosovo, Romania, Bulgaria, Macedonia

³ Spain, Portugal, Andorra, Gibraltar

DURATION AND PURPOSE OF TRAVEL

Trips with a destination abroad lasted longer than trips within Switzerland. In 2013, trips of 4 or more overnight stays represented 65 % of the outbound and only 35 % of the inbound trips. On the other hand, trips with only one overnight stay accounted for 30 % of domestic and 10 % of trips abroad. In 2013, the main reasons for trips were, as in the previous year, holidays and recreation. They accounted for 61 % of trips, and almost two-thirds of these had a foreign destination. In second place came trips for the purpose of visiting family and friends (24 %). Business trips accounted for 5 % of trips.

Source: Swiss Federal Statistical Office, Travel behaviour 2013

ACCOMMODATION SECTOR

OVERVIEW

Swiss tourism statistics break accommodation options down into hotel accommodation and supplementary accommodation.

HOTEL ACCOMMODATION

Hotels:

Hotels, boarding houses, guesthouses, motels.

Health establishments:

Sanatoria which are not subsidised by the canton and convalescent homes with medical management or support, alpine health establishments, altitude clinics, rheumatic clinics, public spas.

SUPPLEMENTARY ACCOMMODATION

Private rooms (holiday homes and apartments):

These are properties which are offered for rental to third parties. They exclude properties which are solely occupied by the owners or long-term tenants, or their family members.

Campsites:

Demarcated sites which are accessible to everyone for the temporary parking of caravans and motor homes in which they travel, and for the temporary erection of tents.

Group accommodation:

Dormitories for tourists and groups, club and association houses, mountain refuges and huts.

Youth hostels:

Switzerland's official youth hostels.

Agritourism:

Agritourism or Farm Holidays refers to tourist offers in the country which, generally speaking, are organised by farmers themselves and represent an additional source of income. The three most popular offers in Switzerland are: 'Swiss Holiday Farms', 'Sleep in Straw' and 'tourisme-rural.ch' (combined in the 'Agritourism Switzerland' umbrella organisation since June 2011).

Bed & Breakfast:

Bed & Breakfast stands for all kinds of accommodation where a bed and a breakfast are offered.

Accommodation statistics (HESTA) replace the statistics for hotels and health establishments which date back to 1934 but which were discontinued in 2003 due to budget restrictions. In methodological terms, these figures cannot be compared to the old statistics; HESTA has been in operation since 1st January 2005.

HOTEL ACCOMMODATION

HOTELS AND HEALTH ESTABLISHMENTS

In 2014, the Swiss hotel industry recorded a total of 35.9 million overnight stays, which was 0.9 % more than in the previous year. Swiss demand amounted to 16.0 million overnight stays, which corresponds to an increase of 0.9 % compared with 2013. Foreign guests generated 19.9 million overnight stays, i.e. a rise of 0.9 %. Germany accounted for the strongest foreign demand with 4.4 million overnight stays (-3.9 % compared with 2013), followed by the United Kingdom with 1.7 million overnight stays (+1.7 %) and the United States with 1.6 million (+3.7 %). In terms of tourist regions, the Zurich region recorded the highest number of overnight stays in 2014 with 5.6 million units (+2.4 %). It was followed by Graubünden with 5.1 million overnight stays (-2.1 %) and Valais with 3.9 million overnight stays (no relative change). In 2014, visitors stayed an average of 2.1 nights in Switzerland. For guests from within Switzerland the average length of stay was 2.0 nights while for those from abroad it was 2.2 nights. Among the tourist regions, Graubünden recorded the longest average stay with 2.9 nights.

DEVELOPMENT OF OVERNIGHT STAYS 2014

MONTHLY OVERNIGHT STAYS AND CHANGE IN % COMPARED TO THE SAME PERIOD OF 2013

	Overnight stays Total	Change in %	Overnight stays Foreigners	Change in %	Overnight stays Swiss	Change in %
January	2 782 625	1.7	1 453 627	1.8	1 328 998	1.7
February	2 919 251	-3.9	1 502 657	-1.8	1 416 594	-6.1
March	3 227 446	0.4	1 756 027	0.2	1 471 419	0.7
April	2 356 682	3.4	1 345 710	3.6	1 010 972	3.2
May	2 619 867	2.2	1 522 376	0.0	1 097 491	5.5
June	3 198 713	-2.3	1 889 394	-3.5	1 309 319	-0.6
July	3 920 638	-2.7	2 233 653	-2.1	1 686 985	-3.6
August	4 258 511	2.3	2 539 196	4.7	1 719 315	-1.1
September	3 384 577	1.7	1 808 744	0.1	1 575 833	3.7
October	2 782 427	5.7	1 422 976	4.8	1 359 451	6.6
November	1 867 454	0.3	990 938	1.1	876 516	-0.5
December	2 615 321	4.5	1 442 079	3.5	1 173 242	5.6
Entire year	35 933 512	0.9	19 907 377	0.9	16 026 135	0.9

Source: Swiss Federal Statistical Office, Statistics on tourist accommodation

OVERNIGHT STAYS BY COUNTRY OF RESIDENCE OF VISITORS

Country of residence of visitors	Calendar year 2014	Winter season 2013/2014 (November to April)	Summer season 2014 (Mai to October)
Total	35 933 512	15 651 248	20 164 733
Switzerland	16 026 135	7 220 148	8 748 394
Foreign countries	19 907 377	8 431 100	11 416 339
Europe total (excl. Switzerland)	13 003 781	6 223 898	6 782 976
Germany	4 394 457	2 033 352	2 484 918
United Kingdom ¹	1 667 437	794 861	861 108
France	1 337 882	684 276	673 627
Italy	1 014 058	483 024	516 463
Netherlands	681 671	316 251	375 534
Belgium	625 580	304 937	330 424
Russia	532 775	318 460	251 565
Nordic countries ²	508 264	261 639	254 631
Spain	427 310	180 941	250 253
Austria	384 647	156 663	228 221
Other countries Europe	1 439 896	703 126	753 774
America total	2 310 768	801 232	1 499 150
United States	1 644 424	538 242	1 042 217
Canada	230 848	84 907	146 378
Brazil	222 211	96 661	114 278
Other countries America	216 915	86 782	131 189
Asia total	3 996 839	1 167 011	2 779 580
China (incl. Hong Kong)	1 142 438	348 428	690 547
Gulf States ³	770 725	164 619	481 790
Japan	439 894	89 501	395 432
India	485 216	106 594	369 794
Republic of Korea	263 189	91 192	116 976
Other countries Asia	895 377	366 677	516 277
Africa total	281 179	133 802	146 559
Australia, Oceania total	314 810	105 157	208 074

¹ Great Britain and Northern Ireland² Denmark, Finland, Norway, Sweden, Iceland³ Bahrain, Qatar, Kuwait, Oman, Saudi Arabia, United Arab Emirates

**HOTEL INDUSTRY: SUPPLY AND DEMAND
CANTONS**

Canton	Capacity ¹		Overnight stays in thousands			Net occupancy rate in %	
	Rooms	Beds	Swiss	Foreigners	Total	Rooms ²	Beds ³
Graubünden	18 646	38 649	2 868	2 184	5 052	48.9	40.2
Bern	16 509	32 194	2 234	2 729	4 963	53.2	45.0
Zurich	14 282	24 746	1 285	3 528	4 813	65.4	53.6
Valais	14 061	29 170	2 049	1 838	3 887	47.8	40.3
Vaud	9 391	17 744	1 110	1 545	2 656	53.5	42.3
Geneva	9 188	15 186	583	2 356	2 939	65.1	53.2
Ticino	8 309	16 441	1 397	916	2 313	47.7	39.8
Lucerne	6 557	12 265	703	1 217	1 920	52.0	44.1
St. Gallen	5 035	9 730	581	450	1 031	38.9	30.5
Basel-Stadt	3 904	6 801	364	799	1 163	62.7	47.3
Aargau	3 077	5 157	344	342	686	47.7	37.5
Schwyz	2 209	4 286	377	216	593	43.3	39.5
Thurgau	2 143	3 746	275	162	437	41.7	32.8
Obwalden	2 106	4 233	254	371	625	50.7	42.5
Fribourg	2 082	4 278	289	181	470	41.5	31.0
Solothurn	1 644	2 917	191	189	380	46.8	36.4
Zug	1 337	2 151	154	183	337	55.0	43.9
Basel-Landschaft	1 337	2 441	158	151	309	46.5	35.5
Uri	1 271	2 658	94	151	244	37.0	28.1
Neuchâtel	1 170	2 264	126	115	241	41.0	29.9
Appenzell Auser rhoden	864	1 538	94	33	127	30.3	24.3
Jura	843	1 739	85	21	106	24.7	17.9
Nidwalden	752	1 595	91	112	203	45.7	36.4
Glarus	721	1 539	108	21	129	30.7	25.0
Schaffhausen	604	1 156	70	71	140	45.0	34.3
Appenzell Inner rhoden	595	1 826	143	25	168	47.3	28.4
Total	128 638	246 449	16 026	19 907	35 934	52.0	42.2

¹ Only open establishments (available rooms and beds)² Number of room nights in per cent of the net room capacity³ Number of overnight stays in per cent of the net bed capacity

Source: Swiss Federal Statistical Office, Statistics on tourist accommodation

TOURIST REGIONS

Tourist regions	Capacity ¹		Overnight stays in thousands			Net occupancy rate in %	
	Rooms	Beds	Swiss	Foreigners	Total	Rooms ²	Beds ³
Graubünden	18 819	39 083	2 868	2 184	5 052	48.9	40.2
Zurich Region	17 379	29 981	1 676	3 931	5 607	62.7	51.2
Valais	13 959	28 958	2 049	1 838	3 887	47.8	40.3
Lucerne/Lake Lucerne	12 481	24 316	1 485	2 048	3 533	48.4	40.9
Bernese Oberland	11 672	23 464	1 563	2 120	3 684	54.5	47.2
Eastern Switzerland	9 662	18 999	1 246	732	1 979	38.9	30.1
Geneva	9 188	15 152	583	2 356	2 939	53.5	42.3
Lake Geneva Region (Vaud)	9 159	17 351	1 110	1 545	2 656	65.1	53.2
Ticino	8 653	17 095	1 397	916	2 313	47.7	39.8
Basel Region	5 759	10 052	575	991	1 566	56.7	42.8
Bern Region	5 743	10 056	732	747	1 479	51.7	41.0
Jura & Three-Lakes	4 056	7 628	452	316	768	39.3	29.0
Fribourg Region	2 118	4 353	289	181	470	41.5	31.0
Total	128 648	246 489	16 026	19 907	35 934	52.0	42.2

COMMUNES

Communes	Capacity ¹		Overnight stays in thousands			Net occupancy rate in %	
	Rooms	Beds	Swiss	Foreigners	Total	Rooms ²	Beds ³
Zurich	7 962	13 918	590	2 327	2 916.2	70.1	57.6
Geneva	6 388	10 507	296	1 756	2 052.0	65.1	53.6
Zermatt	3 254	6 433	545	729	1 274.2	67.1	59.9
Lucerne	3 022	5 717	322	896	1 218.2	68.2	58.8
Basel	3 795	6 608	355	794	1 149.4	63.8	48.0
Davos	3 123	6 151	420	411	831.4	51.7	43.1
Lausanne	2 317	4 077	311	444	755.5	64.5	51.0
Bern	2 068	3 493	324	395	719.6	66.9	56.7
Interlaken	1 521	2 922	149	556	704.8	72.0	67.3
St. Moritz	2 099	4 012	209	460	669.2	58.6	51.5
Opfikon	1 534	2 612	156	402	558.1	71.2	58.6
Grindelwald	1 350	2 930	168	350	518.9	61.8	53.7
Lugano	1 614	3 044	216	298	514.5	56.9	47.1
Montreux	1 342	2 378	166	296	462.0	59.3	53.5
Lauterbrunnen	1 264	2 520	118	331	448.6	62.7	56.2
Total	128 648	246 489	16 026	19 907	35 934	52.0	42.2

SUPPLY IN HOTELS AND HEALTH ESTABLISHMENTS

Year	Surveyed establishments	Surveyed rooms	Surveyed beds	Open establishments	Available rooms	Available beds
2014	5 129	140 722	272 636	4 554	128 638	246 449
2013	5 191	140 192	271 298	4 662	128 648	246 489
2012	5 257	140 372	271 168	4 742	129 097	246 951
2011	5 396	142 101	273 969	4 773	128 719	245 072
2010	5 477	142 815	275 193	4 827	128 865	245 251
2009	5 533	142 551	273 974	4 866	127 758	241 635

DEMAND IN HOTELS AND HEALTH ESTABLISHMENTS

Year	Arrivals	Overnight stays	Average duration of stay	Net occupancy rate in % (rooms) ¹	Net occupancy rate in % (beds) ²
2014	17 162 053	35 933 512	2.1	52.0	42.2
2013	16 831 177	35 623 883	2.1	51.6	41.9
2012	16 297 767	34 766 273	2.1	50.5	40.8
2011	16 228 987	35 486 256	2.2	51.6	41.9
2010	16 202 574	36 207 812	2.2	52.3	42.9
2009	15 564 494	35 588 893	2.3	51.7	42.6

SIZE OF HOTELS AND HEALTH ESTABLISHMENTS

Size of establishment	Open establishments	in %	Arrivals	Overnight stays
0 to 10 beds	673	14.8	159 330	351 135
11 to 20 beds	993	21.8	649 543	1 398 506
21 to 50 beds	1 510	33.2	2 993 139	6 496 652
51 to 100 beds	846	18.6	4 489 679	9 685 445
101 to 150 beds	264	5.8	2 739 834	5 624 231
151 to 200 beds	109	2.4	1 413 415	3 173 444
201 to 300 beds	96	2.1	2 184 067	4 447 722
301 and more beds	64	1.4	2 533 046	4 756 377
Total	4 554	100.0	17 162 053	35 933 512

¹ Number of room nights in per cent of the net room capacity² Number of overnight stays in per cent of the net bed capacity

SUPPLEMENTARY ACCOMMODATION ¹

HOLIDAY APARTMENTS

ANALYSIS OF SUPPLEMENTARY ACCOMMODATION 'PASTA LIGHT'

The precise number of touristic second homes in Switzerland is currently not known. The following analyses are based on information regarding residential units used for tourism, which are collected by STF classification offices, other tourist organisations and municipalities, as well as by reservation systems and booking platforms. The reported figures therefore do not reflect the total overnight stays in holiday apartments. One third of the destinations have no record of overnight stays.

Total annual overnights from holiday apartments in Switzerland are estimated to be approx. 18 million per year (basis: last FSO survey 2003). In 2014, approx. 70 000 holiday apartments and more than 11 million overnights were surveyed. The average duration of residence has been slightly more than a week and the occupancy rate of the holiday apartments has been 62 nights. 64.1% of the guests came from Switzerland, 31.5% from Europe (Switzerland excluded) and 4.4% from the rest of the world.

Overnights in holiday apartments in Switzerland have increased from 2013 to 2014. ²

CHANGE IN OVERNIGHT STAYS FROM 2013 TO 2014

	in %
Jura & Three-Lakes	7.6
Valais	6.9
Lake Geneva Region	4.0
Graubünden	3.9
Lucerne/Lake Lucerne	2.9
Zurich Region	2.7
Bernese Oberland	1.9
Ticino	-0.5
Eastern Switzerland/Liechtenstein	-0.6
Fribourg Region	-0.8
Bern Region	-3.2
Basel Region	-7.1
Geneva ³	x

GUESTS' COUNTRY OF ORIGIN (OVERNIGHT STAYS)	in %		in %
Switzerland	64.1	Russia (Russian Federation)	0.8
Germany	12.7	Saudi Arabia	0.8
Netherlands	4.8	Italy	0.7
France	3.6	Poland	0.7
Great Britain	2.9	Spain	0.6
Belgium	2.7	Israel	0.6
United States	0.9	India	0.4

¹ Non-hotel accommodation

² Including holiday apartments with occupancy information for both years. As of november 2013, commercialisation of holiday apartments from Agritourism Switzerland and individual estate agencies by e-domizil.

³ Geneva has no representative data.

Source: Swiss Tourism Federation

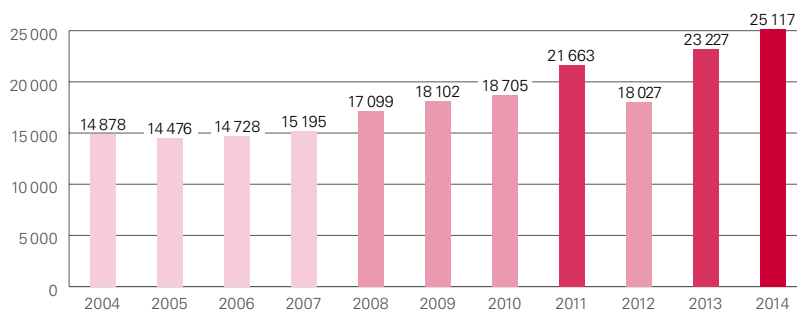
CLASSIFIED HOLIDAY APARTMENTS AND GUEST ROOMS

HOLIDAY APARTMENTS AND GUEST ROOMS BY REGIONS

Tourist region	A *****	A *****	A *****	A ****	A ***	A ***	A **	A **	A *	A *	Total
Basel Region	0	0	0	1	0	1	0	0	0	0	2
Bern Region	1	0	0	5	2	23	0	12	0	2	45
Bernese Oberland	1	72	16	547	142	1 709	237	268	72	0	3 082
Fribourg Region	0	1	0	14	15	93	19	20	3	0	165
Geneva	0	0	0	5	0	3	0	0	0	1	9
Lake Geneva Region	0	46	16	143	73	380	69	95	10	3	835
Graubünden	5	166	48	1 060	393	3 790	484	600	79	13	6 638
Jura & Three-Lakes	0	5	5	32	53	231	75	68	19	1	489
Lucerne/Lake Lucerne	0	18	87	114	47	656	88	122	17	2	1 151
Eastern Switzerland/Liechtenstein	0	1	2	114	23	316	64	67	18	1	606
Ticino	0	19	8	174	53	840	85	135	32	7	1 353
Valais	21	425	69	1 903	520	5 989	532	1 053	103	28	10 643
Zurich Region	0	2	0	15	2	93	0	5	0	0	117
Total	28	755	251	4 127	1 323	14 124	1 653	2 445	353	58	25 117¹

¹ Of these, 365 objects are guest rooms.

AWARDED CERTIFICATES 2004 – 2014



For more information on the classification of holiday apartments and guest rooms, please go to page 53 of this brochure.
Source: Swiss Tourism Federation

GROUP LODGINGS

CONTACT groups.ch is the private umbrella organisation of Swiss group accommodation providers. In 2014 it arranged 1.83 million overnight stays (-6.8%) for 13 508 groups in a total of 755 properties. The average length of stay in the group accommodation providers remained at the high level of 4.8 nights and the long-term trend for an average group size of 28 people was sustained. In rural regions demand from the four most important countries of origin (Switzerland, Germany, France and Italy) again declined. However, the urban regions of Lake Geneva, Basel and Zurich were able to stand their ground. The number of affiliated properties changed significantly in the following regions: Bernese Oberland (-6), Grisons (+9) and Lucerne / Lake Lucerne (+9). The number of beds offered increased by 2 540 in total.

SUPPLY AND DEMAND

Tourist region	Establishments	Groups	Arrivals	Overnight stays	Duration of stay	Group size
Basel Region	5	82	1 840	5 194	2.8	22
Bern Region	14	193	4 848	18 151	3.7	25
Bernese Oberland	124	2082	58 405	286 875	4.9	28
Fribourg Region	21	515	18 741	85 461	4.6	36
Lake Geneva Region (Vaud)	39	982	30 094	112 595	3.7	31
Graubünden	150	2 074	61 410	375 657	6.1	29
Jura & Three-Lakes	48	1 168	34 581	135 575	3.9	30
Lucerne / Lake Lucerne	76	1 456	42 822	182 344	4.3	29
Eastern Switzerland / Liechtenstein	67	1 485	41 895	183 470	4.4	28
Ticino	24	638	13 569	65 593	4.8	21
Valais	176	2 592	68 646	351 375	5.1	26
Zurich Region	11	241	7 035	24 940	3.5	29
Total	755	13 508	383 886	1 827 230	4.8	28

Guests' Country of Origin	Groups	Arrivals	Overnight stays	Duration of stay	Group size
Switzerland	10 933	320 883	1 421 751	4.4	29
Germany	1 206	26 066	198 887	7.6	22
France	257	6 743	32 999	4.9	26
Others	1112	30 194	173 593	5.6	28
Total	13 508	383 886	1 827 230	4.8	28

Source: CONTACT groups.ch

YOUTH HOSTELS

In 2014, youth hostels based in Switzerland recorded a total of 951 000 overnight stays or 0.4 % more than during the previous year. Domestic demand was at 548 000 overnight stays, which corresponds to a stable result (−0.1 %). Foreign demand generated 403 000 overnight stays or 1.1 % more than in 2013. German guests accounted for the largest share of foreign demand with 101 000 overnight stays (−3.6 % compared with 2013), followed by guests from the United Kingdom with 38 000 overnight stays (+13.0 %) and from France with 29 000 overnight stays (−2.3 %). In terms of tourist regions, Graubünden recorded the largest number of overnight stays with 150 000 units (which corresponds to a rise of 1.6 % compared with 2013), followed by the Zurich region with 120 000 overnight stays (−2.4 %) and the Bernese Oberland with 95 000 overnight stays (+16.8 %). In 2014, the average duration of stay in the youth hostels was 2 nights at national level. Swiss guests stayed an average of 2.0 nights whereas foreign visitors stayed an average of 1.9 nights. In terms of tourist regions, the longest length of stay was registered in Graubünden with a result of 2.5 nights.

SUPPLY AND DEMAND

Tourist Region	Surveyed establishments	Surveyed beds	Arrivals	Overnight stays	Average duration of stay
Graubünden	8	1 030	60 050	149 786	2.5
Eastern Switzerland	5	464	28 549	48 444	1.7
Zurich Region	7	735	62 842	120 161	1.9
Lucerne/Lake Lucerne	5	507	41 439	72 725	1.8
Basel Region	2	275	x	x	x
Bern Region	3	288	29 502	47 700	1.6
Bernese Oberland	5	546	51 211	95 127	1.9
Jura & Three-Lakes	3	266	x	x	x
Lake Geneva Region (Vaud)	4	550	38 369	82 063	2.1
Geneva	1	334	x	x	x
Valais	4	509	29 856	58 753	2.0
Ticino	4	596	42 371	89 276	2.1
Fribourg Region	1	76	x	x	x
Total	52	6 176	485 197	951 037	2.0

x = omitted for purposes of data protection (less than 3 open establishments)

Source: Swiss Federal Statistical Office, Statistics on tourist accommodation

CAMPSITES

In 2014, the campsites¹ recorded 2.7 million overnight stays representing a decrease of 6.7% compared with the previous year. Swiss guests accounted for 1.6 million overnight stays, down 4.3%. Foreign guests generated 1.0 million overnight stays, down 10.2%. German guests accounted for 403 000 overnight stays (-7.4% compared with 2013), which corresponds to the highest absolute result among the foreign countries. They were followed by visitors from the Netherlands with 266 000 overnight stays (-15.9%), France with 82 000 (-7.3%) and the United Kingdom with 64 000 (-5.0%). With a total of 695 000 overnight stays for 2014, Ticino ranks first among all tourist regions in terms of absolute overnight stays but, however, saw a 3.8% decrease compared with the previous year. It was followed by Valais with 379 000 overnight stays (-6.7%). For Switzerland as a whole, the average length of stay was 3.2 nights in 2014. Swiss guests spent an average of 3.4 nights on campsites while foreign guests stayed 2.9 nights. Of all tourist regions, Ticino recorded the longest average length of stay with 4.1 nights.

SUPPLY AND DEMAND

Tourist region	Surveyed establishments	Total campsites	Overnight leased campsites	Permanently leased campsites	Arrivals	Overnight stays	Average duration of stay
Graubünden	44	5 307	3 643	1 664	76 968	246 575	3.2
Eastern Switzerland	37	4 779	1 842	2 937	60 792	154 777	2.5
Zurich Region	27	3 400	1 386	2 014	40 965	106 273	2.6
Lucerne/Lake Lucerne	39	5 404	2 487	2 917	98 622	247 197	2.5
Basel Region	10	802	252	550	8 869	21 904	2.5
Bern Region	10	1 243	870	373	26 645	56 143	2.1
Bernese Oberland	53	5 036	3 210	1 825	93 248	285 934	3.1
Jura & Three-Lakes	36	5 770	2 552	3 219	51 593	182 522	3.5
Lake Geneva Region (Vaud) and Geneva ²	45	7 856	3 413	4 443	83 835	250 137	3.0
Valais	64	7 890	6 068	1 822	106 322	378 894	3.6
Ticino	34	6 045	5 053	992	169 496	695 252	4.1
Fribourg Region	13	2 625	710	1 915	19 111	46 934	2.5
Total	412	56 157	31 486	24 671	836 466	2 672 542	3.2

¹ Only campsites which are included in the Swiss Business and Enterprise Register (BER).

Note: the methodology for calculating the statistic of campsites has been reworked in 2010.

More information on: www.tourismus.bfs.admin.ch (in German or French)

² Two regions combined due to data protection (less than 3 open establishments in the Geneva tourist region)

Source: Swiss Federal Statistical Office, Statistics on tourist accommodation

AGRITOURISM

With approximately 256 000 overnight stays¹ it was a successful year for agritourism in Switzerland. The office of the umbrella organisation Agritourism Switzerland opened up on 1st June 2011. Its purpose is to coordinate the activities of the three founding organisations, 'Swiss Holiday Farms', 'Sleep in Straw!' and 'tourisme-rural.ch' and improve the general conditions for service providers throughout Switzerland, while focusing on increasing the value added of the member operations (over 400 providers).

'SWISS HOLIDAY FARMS' AND 'SLEEP IN STRAW!': OVERNIGHT STAYS AND ESTABLISHMENTS

Tourist region ²	Overnight stays 'Swiss Holiday Farms'	Overnight stays 'Sleep in Straw!'	Total 2014
Graubünden	4 795	2 639	7 434
Eastern Switzerland	21 311	5 251	26 562
Zurich Region	5 745	2 150	7 895
Basel Region	2 699	2 917	5 616
Central Switzerland	23 602	6 591	30 193
Schweizer Mittelland	23 711	3 726	27 437
Western Switzerland ³	4 988	6 439	11 427
Bernese Oberland	2 915	2 158	5 073
Ticino	2 631	498	3 129
Valais	451	1 023	1 474
Total	92 848	33 392	126 240
Number of establishments	145	151	296

¹ Of which approx. 130 000 overnight stays are attributable to 'tourisme-rural.ch'.

² Old FSO definition of regions

³ Fribourg Region, Geneva, Lake Geneva Region (Vaud), Neuchâtel/Jura/Bernese Jura combined

Source: Agritourism Switzerland

BED AND BREAKFAST

In 2014, 175 102 guests stayed in 1 022 lodging facilities in Switzerland (2013: 186 478 guests and 1 036 lodging facilities). A total of 422 786 overnights were recorded (2013: 445 401). Guests from Switzerland accounted for 210 644 overnights (2013: 218 123), while Europe – excluding Switzerland – represented the second largest share with 175 384 (2013: 188 325).

These results were not extrapolated and are not directly comparable to those of the preceding years, because the number of lodging facilities fluctuates year-by-year (additions and deletions throughout the year). However, the adjusted figures show an increase in overnights (2013/14: +3.9%, 2012/13: +1%), while the average length of stay remained unchanged (2.4 nights).

SUPPLY AND DEMAND

Year	Establishments ¹	Rooms	Beds	Arrivals	Overnight stays Swiss	Overnight stays foreigners	Overnight stays total
2014	1 022	3 094	6 208	175 102	210 644	212 142	422 786
2013	1 036	3 031	6 239	186 478	218 123	227 278	445 401
2012	988	2 903	5 965	179 792	206 338	234 723	441 061
2011	912	2 662	5 528	170 760	189 421	215 177	404 598

Tourist region	Overnight stays 2014	Overnight stays 2013	Change in %
Valais	60 254	53 941	11.70
Lucerne/ Lake Lucerne	48 373	49 061	-1.40
Lake Geneva Region (Vaud)	47 462	40 777	16.39
Bernese Oberland	39 777	47 097	-15.54
Zurich Region	38 247	41 621	-8.11
Bern Region	34 082	45 514	-25.12
Eastern Switzerland	33 564	32 969	1.80
Ticino	33 177	37 101	-10.58
Graubünden	24 995	26 806	-6.76
Jura & Three-Lakes	24 936	27 558	-9.51
Fribourg Region	19 779	20 677	-4.34
Basel Region	14 979	18 721	-19.99
Geneva	2 891	3 558	-18.75

¹ The accommodation units stem exclusively from the list of members of the Bed and Breakfast Switzerland organisation.
Source: Bed and Breakfast Switzerland

HOTEL AND RESTAURANT INDUSTRY

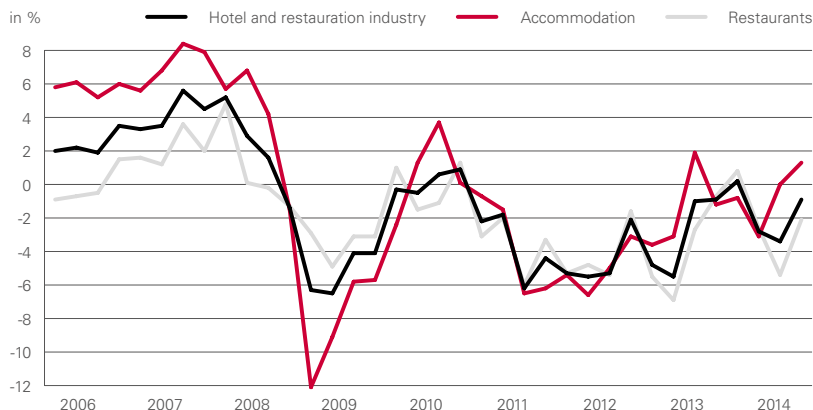
MAJOR EMPLOYER IN SWITZERLAND

209 920	employees (2014)
8 676	trainees in basic vocational education and training (2013)
28 855	hotel and restaurant establishments (2012)
26 805	VAT-taxable hotel and restaurant establishments (2012)
28.2	billion francs of VAT-taxable annual turnover in catering business and hotels (2012)
932.5	million francs paid in VAT (after pre-tax deduction) (2012)
	or
9.1	% of the overall net Federal Tax Administration (FTA) receivables (2012)

Switzerland's hotel and restaurant industry, with its 209 920 employees, is a very important employer in Switzerland. Some 5 % of the country's employees work in the hotel and restaurant industry. In addition, this industry employs some 8 676 young people as trainees (apprentices) within the framework of basic vocational education and training. In addition to the jobs in the hotel and restaurant industry itself, the sector indirectly generates many other jobs – within the construction industry, in agriculture, and in specialised trade. For instance, half of the meat in Switzerland is consumed in the catering industry. This means that jobs are created both in agriculture and the butchery business.

The latest census by the Federal Statistical Office (2012) counts some 28 855 hotel and restaurant establishments in Switzerland. Of these, 66.3 % are restaurants, 19 % hotels, 10.3 % pubs, night clubs or discos and 4.4 % snack stands and take-away establishments. The hotel and catering industry generated a VAT-taxable annual turnover of around CHF 28.2 billion. The hotel and restaurant industry makes a substantial contribution to VAT revenues. In 2012, it paid the net sum of CHF 932.5 million in VAT. The approximately 26 805 restaurants and hotels in 2012 liable for tax thus contributed 9.1 % of the overall Federal Tax Administration (FTA).

The most recent (2013) VAT statistics from the Swiss Federal Tax Administration (FTA) were not yet available when this overview of the industry was printed. Therefore, this section is based on the 2012 figures. The latest statistics from the FTA are available online at www.estv.admin.ch.

SALES DEVELOPMENT COMPARED TO SAME QUARTER OF THE PREVIOUS YEAR

Source: Survey KOF (economic research department of the Swiss Federal Institute of Technology, Zurich) in cooperation with GastroSuisse

**HOTEL AND RESTAURATION INDUSTRY (ACCOMMODATION AND RESTAURANT):
CHANGE IN SALES COMPARED TO THE PRIOR YEAR**

1 st quarter	+0.2%	3 rd quarter	-3.4%
2 nd quarter	-2.8%	4 th quarter	-0.9%

Source: Survey KOF (economic research department of the Swiss Federal Institute of Technology, Zurich) in cooperation with GastroSuisse

For the first time since the 4th quarter of 2010, the hospitality establishments reported a slight increase in turnover again at the start of 2014, amounting to +0.2%. Thus, the slight upwards trend seen at the end of 2013 was continued. In the 2nd and 3rd quarters of 2014, turnover declined again. In 2014, the hospitality industry's average change in turnover was -1.73% compared to the previous year.

**ACCOMMODATION:
CHANGE IN SALES COMPARED TO THE PRIOR YEAR**

1 st quarter	-0.8%	3 rd quarter	+0.0%
2 nd quarter	-3.1%	4 th quarter	+1.3%

Source: Survey KOF (economic research department of the Swiss Federal Institute of Technology, Zurich) in cooperation with GastroSuisse

In the accommodation segment, the first half of 2014 was characterised by turnover losses of -0.8% and -3.1% . However, these were less pronounced than in the previous year. Thanks to the year's highest monthly turnovers in October and December 2014, the fourth quarter brought 2014 to an end with a 1.3% increase in turnover. It is particularly pleasing to note the stronger demand among local guests, as well as among tourists from the Asian region, which generated the strongest increases in overnight stays during 2014.

**RESTAURANTS:
CHANGE IN SALES COMPARED TO THE PRIOR YEAR**

1 st quarter	+0.8 %	3 rd quarter	-5.4 %
2 nd quarter	-2.6 %	4 th quarter	-2.1 %

Source: Survey KOF (economic research department of the Swiss Federal Institute of Technology, Zurich) in cooperation with GastroSuisse

Unlike the accommodation segment, the restaurant segment was able to report positive growth in turnover at the start of 2014, amounting to $+0.8\%$. The decline in turnover during the 2nd quarter was further intensified in the 3rd quarter, before the restaurant segment, at a low level, picked up again to some extent in the 4th quarter. In 2014, the downwards trend in turnover slowed to an average of -2.3% .

TURNOVER PER ESTABLISHMENT



Source: GastroSuisse, Industry Report 2015

The generated annual turnover differed significantly between the restaurant establishments and the hotel establishments. In 2014, 12.4% of the restaurants had to get by on turnover of 150 000 francs or lower, while only a few of the surveyed hotels (3.6%) were in the same category. Although over half of all restaurant establishments (54.9%) achieved turnover of up to 550 000 francs in the past year, there were significantly fewer hotel establishments in the same turnover category (28.4%). Of the surveyed hoteliers, 47% reported turnover of between 850 001 and 5 million francs (5.4 percentage points more than in the previous year). In the restaurant segment, 26.1% of the establishments were in this turnover category. Annual turnover of more than two million francs was generated by 21.5% of hotel establishments. This level of turnover was achieved by 8.3% of the restaurant establishments.

AN OVERVIEW OF IMPORTANT KEY RATIOS FOR THE RESTAURANT INDUSTRY 2013

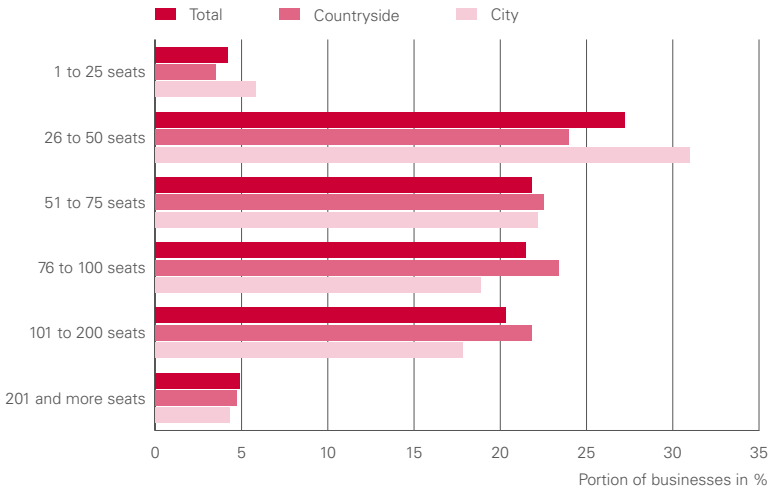
Total turnover per operating day	2 220 CHF
Total turnover per employee	100 279 CHF
Total turnover per employee and operating day	370 CHF
Turnover per restaurant per seat	9 704 CHF
Turnover per restaurant per seat and operating day	36 CHF
Turnover from food preparation per seat	2 334 CHF
Turnover from food preparation per seat and operating day	9 CHF

Source: GastroSuisse, Industry Report 2015

In restaurants, the turnover generated per person employed was on average CHF 100 279; and in hotels with a restaurant the corresponding amount was only slightly higher at CHF 116 821. Total turnover per operating day in restaurants was on average CHF 2 220, and in hotels with a restaurant CHF 4 889. Turnover per seat in a restaurant totalled CHF 9 704 or CHF 9 per day of operation.

For more information, check the publication from GastroSuisse 'Branchenspiegel 2015' ('Industry Report 2015'), available from GastroSuisse (phone: 0848 377 111) for CHF 35.

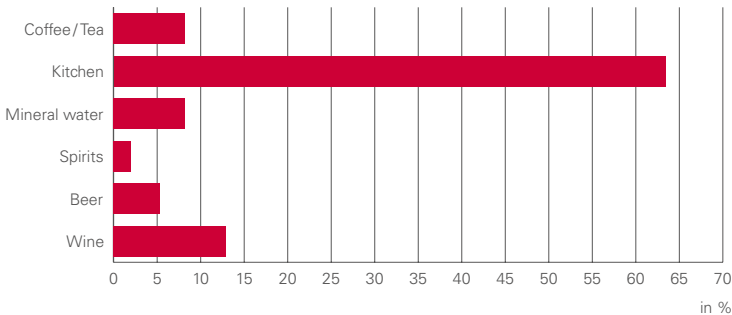
BUSINESS SIZE: NUMBER OF SEATS PER REGION



Source: GastroSuisse, Industry Report 2015

TURNOVER MIX

In 2013, 63.4% of an average restaurant’s turnover was generated from food orders. Alcoholic drinks were in second place, generating 20.2% of turnover, whereas 16.4% of turnover resulted from the sale of mineral water, coffee and tea. Compared to the previous year, the proportion of total turnover attributed to cuisine decreased by 1.9 percentage points. On the other hand, the proportion attributed to mineral water increased by 1.6 percentage points.



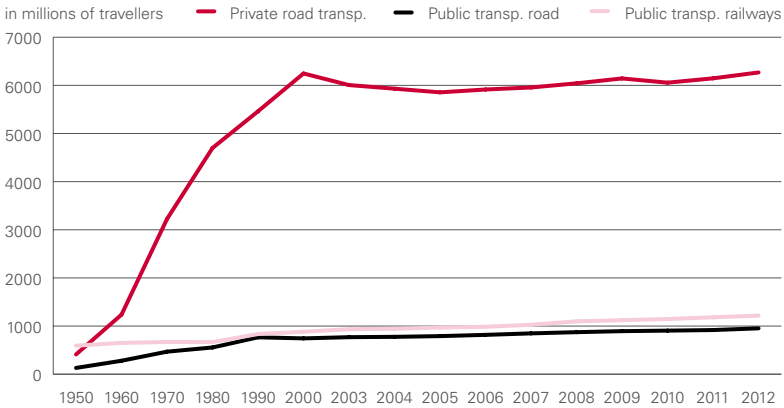
Source: GastroSuisse, Industry Report 2015

TOURISM INFRASTRUCTURE

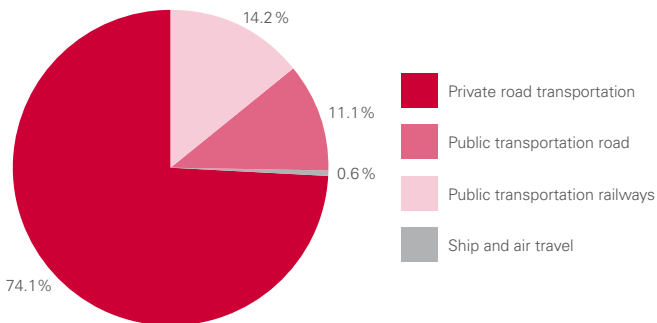
TRANSPORT

PASSENGER TRANSPORTATION

NUMBER OF PASSENGERS PER CARRIER 1950–2012



NUMBER OF PASSENGERS PER CARRIER 2012
IN % OF TOTAL TRANSPORTS



Source: LITRA Public transport information service

PUBLIC TRANSPORT

The public transport route network on railways, roads, lakes and rivers adds up to a total of 28 382 kilometres. 28 777 stopping points are served. In 2014, 2.34 million passengers made use of a half-fare card, 442 000 persons held a general abonnement valid throughout the country and 1.3 million persons obtained a combined season ticket in one of the 19 regional tariff networks.

ONE OF THE DENSEST RAILWAY NETWORKS IN THE WORLD

The railroad network of Switzerland totals 5 239 kilometres. 3 137 kilometres are part of the Swiss Federal Railways network. From Monday to Friday, the Swiss railways (SBB) operate around 8 420 passenger trains or 394 000 train kilometres on their route network. Around half of this consists of long-distance services (Eurocity, Intercity and express trains), the other half of regional and suburban railway services. In 2014, Swiss Federal Railways carried 430 million passengers. The average journey distance mounted to 41 kilometres. In addition to Swiss Federal Railways, a further 39 railway companies operate in the public transport sector, which are often referred to as private railways.

FINELY TUNED TRANSPORT NETWORK WITH BUSES, TRAMS AND THE POSTBUS

During the year 2013, 118 transport companies transported guests by tram, trolley bus and bus on a 20 389 kilometre-long network (figures include PostBus). Around 16 400 employees were necessary in order to transport the approximately 1.5 billion passengers with buses and trams.

The 869 PostBus routes operate a network of more than 11 869 kilometres. 2 136 PostBus Switzerland Ltd. employees, with an additional 1 584 drivers from PostBus operators, conveyed almost 140.6 million passengers with 2 193 Postbuses. The vehicles covered an overall distance of 108 million kilometers.

Source: Public Transport Association, Swiss railway network, PostBus Switzerland Ltd.

NAVIGATION: ACTIVE LAKE AND RIVER CRUISING IN SWITZERLAND

In 2014 the 16 companies joined together in the Association of Swiss Navigation Companies (ASNC) transported a total of 12 million passengers with 148 boats. This represents a slight increase of 100 000 passengers compared to the prior year. A more substantial increase could not be achieved because of the wet and variable weather during the summer.

Lake Lucerne and Lake Geneva, each with 2.2 million passengers, lead the ranking based on the number of passengers, followed by the Lake Zurich Horgen–Meilen ferry with 2.06 million passengers and Lake Zurich (incl. Limmat River) with 1.68 million passengers.

In distance travelled, the performance declined slightly by 23 700 kilometres to 2.39 million kilometres. Inland waterway transportation covers a network of approximately 1 545 kilometres.

Source: LITRA Public transport information service

AIR TRAFFIC: ALMOST 48 MILLION AIR PASSENGERS

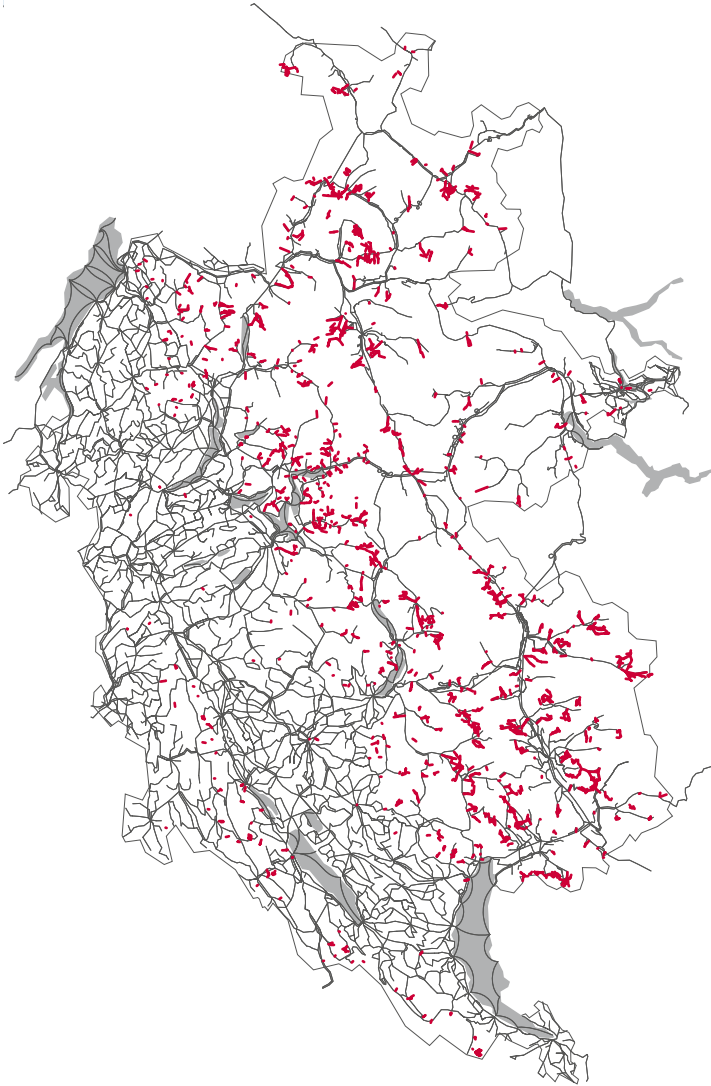
In 2014, Switzerland's airports recorded some 454 837 flight movements (take-offs and landings, only schedule and charter flights), 1.5 % more than in 2013. Of the 47.5 million passengers taking off from or landing in Switzerland, about 94 412 used Switzerland as a transit station.

FLIGHT MOVEMENTS AND PASSENGERS

Airport	Movements	Local and transfer passengers	Transit passengers	Total passengers
Zurich Kloten	230 652	25 451 017	56 654	25 507 671
Genève Cointrin	143 265	15 057 335	22 020	15 079 355
Basel Mulhouse	66 218	6 498 654	15 685	6 514 339
Bern Belp	7 981	177 539	53	177 592
Lugano Agno	4 576	135 530	0	135 530
St. Gallen Altenrhein	1 670	84 098	0	84 098
Sion	475	2 258	0	2 258
Total	454 837	47 406 431	94 412	47 500 843

Source: Federal Office of Civil Aviation, Swiss Federal Statistical Office

OVERVIEW OF PUBLIC TRANSPORT AND CABLEWAYS



Legend:
red = cableways
grey = route network of train, bus and ship (without urban networks)

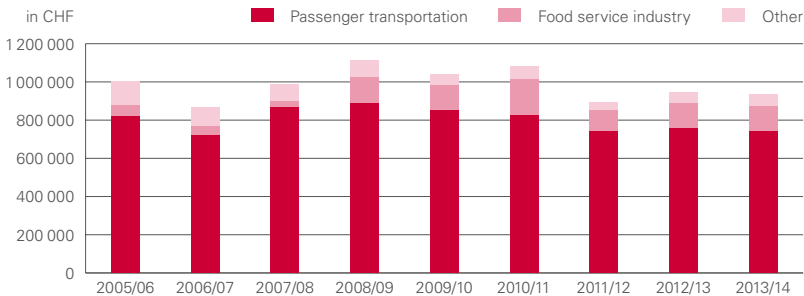
Source: Public Transport Association, Swiss Cableways

CABLEWAYS: IMPORTANT IN TERMS OF REGIONAL ECONOMICS

The mountain regions within the Alps and their peripheral areas are largely dependent on the income generated from tourism. The cableways occupy a key position in the tourism value creation chain. They are often the driving force in tourist destinations.

- By the end of 2013, there were 2 470 licensed facilities in Switzerland. A third of these are T-bars. Rope tows and conveyors account for another third and approximately 30 % are continuously operating lifts (chairlifts, gondolas, 3-rope gondolas and funitels).
- Throughout Switzerland, cableways hire almost 3 300 full-time employees and over 6 500 seasonal workers in transport operations alone.
- In its core business of passenger transport, Swiss cableways achieved in the 2013/14 winter season the sum of CHF 740 millions. Additional revenue of CHF 194 million was generated by the food service industry and other activities (e.g. rentals).
- The areas where visitors and locals can take advantage of the Swiss cableways spread from the Alps of canton Vaud to Eastern Switzerland and the Graubünden Alps. The cableways from Valais and Graubünden together generate almost 60 % of all passenger transports' incomes in Switzerland.

CHANGE IN WINTER REVENUE IN SWITZERLAND (IN 1000)

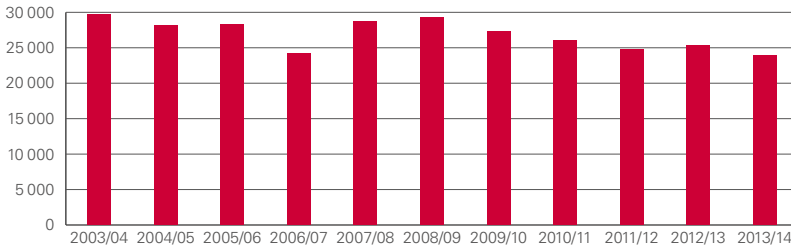


Source: Swiss Cableways (SCW), Facts and Numbers in favour of Swiss Cableways Industry 2014; Laurent Vanat, season balance 2013/14

EVOLUTION OF SKIER-DAYS

Development of the Skier-days (first entry per person and day during winter) depend primarily on the currency, economy and weather factors influencing tourism. Clearly visible is also a notable reduction in the number of children and youths skiing or snowboarding.

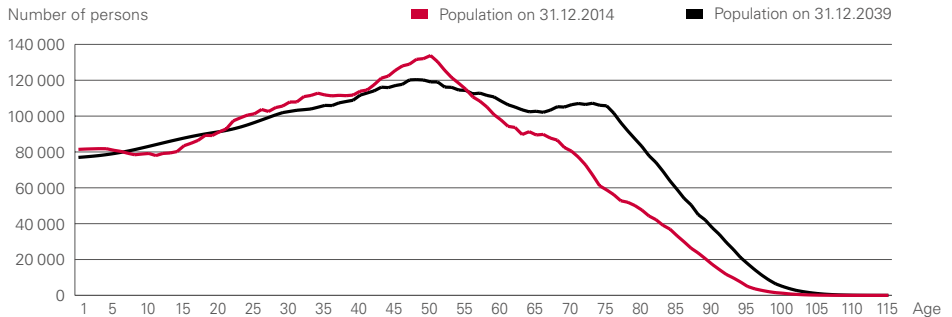
EVOLUTION OF SKIER-DAYS IN SWITZERLAND (IN 1000)



Source: Swiss Cableways (SCW), Facts and Numbers in favour of Swiss Cableways Industry 2014; Laurent Vanat, season balance 2013/14

DEMOGRAPHIC CHANGES

The baby boomer generation (born in the 1950s and 1960s) currently makes up a significant share of winter sport guests. However, most are likely to have given up skiing/snowboarding in about 10 to 20 years from now, primarily due to their age. Therefore, it is vital for the mountain transportation industry to develop attractive services, not only to delay the loss of the baby boomers but also to win (back) new customer segments (young people, guests with migrant background, etc.) for snow sports.

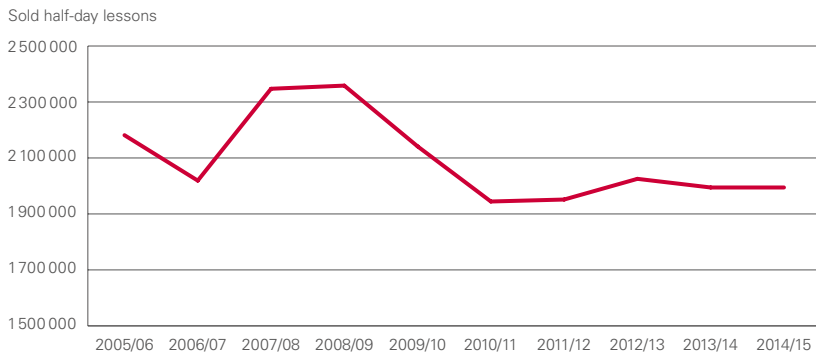


Source: Swiss Federal Statistical Office, Swiss Cableways (SCW)

SWISS SKI SCHOOLS

In 158 Swiss ski schools, approximately 4 000 ski, snowboard, telemark and nordic instructors are engaged. During the high season, as many as 7 000 teach in these schools that offer skiing, snowboard, nordic and telemark lessons for both children and adults. On request, there are also a number of other sportive and comprehensive activities available to guests.

CHANGE IN THE NUMBER OF HALF-DAY LESSONS SOLD BY SWISS SKI SCHOOLS¹



¹ Status as of 31.05.2015, extrapolative estimate for the season 2014/15. Actual up-to-date figures as of August 2015 at www.snowsports.ch. Source: SWISS SNOWSPORTS

SWITZERLANDMOBILITY

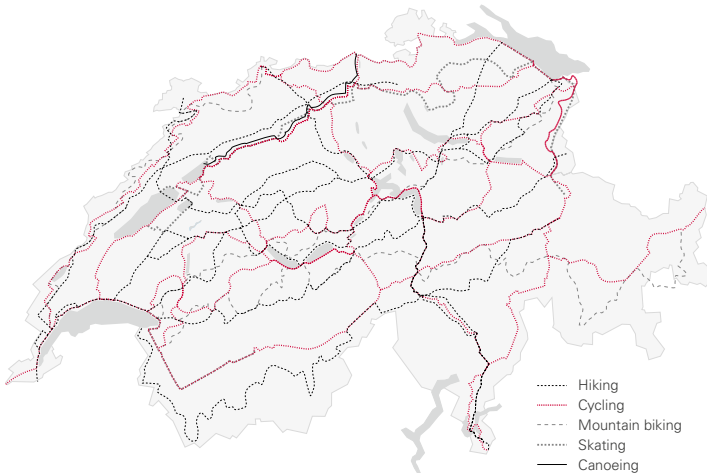
SwitzerlandMobility is the national network of non-motorized traffic for leisure and tourism focusing on the development and communication of the most attractive hiking, cycling, mountain biking, skating, and canoeing routes in Switzerland. SwitzerlandMobility links these routes with public transportation and a wide variety of services in the leisure and tourism industry. The supporting body of the network is the SwitzerlandMobility Foundation.

SWITZERLANDMOBILITY ROUTE NETWORK

	National routes	Regional routes	Local routes	Number of kilometres
Hiking	7	64	265	12 000
Cycling	9	55	68	12 000
Mountain biking	3	16	180	8 000
Skating	3	13	2	1 000
Canoeing	1	8	23	350
Total	23	156	538	33 350

Status as of 31.12.2014

OVERVIEW MAP OF NATIONAL ROUTES



Source: SwitzerlandMobility

SALES GENERATED AS A RESULT OF SWITZERLANDMOBILITY

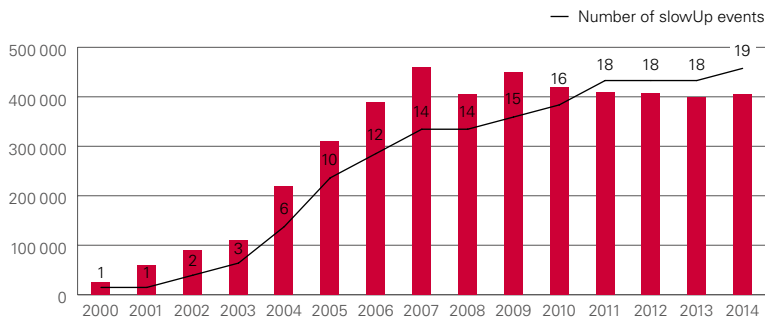
Since SwitzerlandMobility was launched in the spring of 2008, the interest of the Swiss population and foreign tourists has grown steadily: while the web portal schweizmobil.ch registered just over 1 million visits in 2008, the number jumped to over 6.7 million in 2014. In 2011 the LINK-Institute found that about 2 million people, or 24% of the Swiss population, are familiar with Switzerland-Mobility.

Turnover	Day trips in million CHF	Multiple day trips in million CHF	Equipment in million CHF	Total in million CHF
Cycling	64	79	187	330
Hiking	70	109	35	214
Mountain biking, Skating, Canoeing	6	7	Sales already included in cycling	13
Total	140	195	222	557

SLOW UP

SwitzerlandMobility, jointly with Switzerland Tourism and Health Promotion Switzerland, is a supporter of slowUp projects, car-free days of adventure in all regions of Switzerland.

GROWTH IN NUMBER OF SLOW UP PARTICIPANTS 2000–2014



Participants:

- 50% each women and men
- Average age: 39.6 years
- Expenditures per person: CHF 24.90

Source: SwitzerlandMobility

SWISS HIKING TRAILS

Switzerland has an attractive and extensive network of hiking trails of more than 60 000 kilometres. It is the only country in the world where hiking trails are legally protected and marked according to official standards. The 'Swiss Hiking Trail Association' is the umbrella organisation for the regional hiking trail groups. The Association's activities are focusing on the support of the cantonal hiking trail organisations and their members, numbering approximately 45 000. The core responsibilities of the Association and the regional groups include promoting hiking and the hiking trails, raising funds and representing the interests of hikers at a political level.

NETWORK OF HIKING TRAILS PER REGION

Region ¹	Total network of walks (km)	Paved walks (km)	Mountain walks (km)
Lake Geneva Region	12 279	2 761	3 425
Schweizer Mittelland	15 303	4 646	2 626
North-West Switzerland	2 764	961	7
Zurich	2 774	975	16
Eastern Switzerland	19 472	4 088	11 160
Central Switzerland	8 154	1 994	2 925
Ticino	4 352	612	3 405
Total	65 098	16 037	23 564

¹ Official FSO main regions of Switzerland

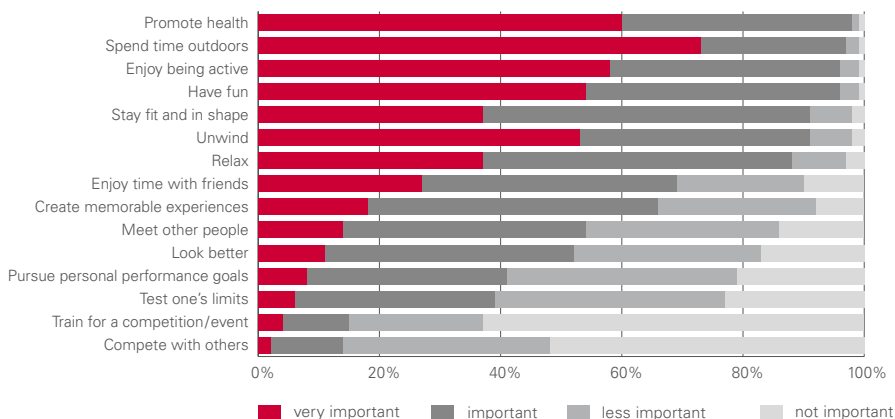
Source: Swiss Hiking

FACTS FROM THE RECENT STUDY ON HIKER BEHAVIOUR IN SWITZERLAND (2014)

- Hiking is extremely popular in Switzerland: 44 % of the population aged 15 to 74 stated that they are active hikers / mountain hikers, which amounts to 2.7 million Swiss hikers, in addition to 300 000 tourists from abroad.
- The popularity of hiking has further increased in recent years: Switzerland has 7 % more hikers today than in 2008.
- The average outlay per person and day during a hike in Switzerland is CHF 45 and CHF 860 per year. Therefore, revenue generated by hikers amounts to approximately CHF 2.8 billion, spread between travel to and from the destination (CHF 750 million), public transportation used along the way (CHF 160 million), meals (CHF 950 million), overnight accommodations (CHF 420 million), equipment (CHF 490 million), and miscellaneous (CHF 40 million).

- On average, each hiker takes 20 shorter or longer hikes per year, averaging time three hours. Distributed over a full year, this results in about 60 hours of hiking for a typical hiker. About 75 % of all hikers also hike in the winter months on occasion.
- Hikers are nowhere near the only ones using the hiking trails: overall, more than 80 % of the Swiss population is making use of marked hiking trails now and then.
- Signposts and trail markers provide the most important navigation support along the way.

IMPORTANCE OF VARIOUS REASONS FOR HIKING



Source: 'Sport Schweiz 2014' study, number of respondents: 10 652, of which 3665 hikers (recognized athletes only)

HIKERS ARE SATISFIED WITH THE OFFER

Of particular importance to hikers is the scenery along the trails, enjoyment of the outdoors and the ability to unwind while hiking. In terms of infrastructure, well-marked trails including information on hiking times at regular intervals, unpaved paths and interesting and well maintained trails are very important to hikers. More than 60 % additionally consider restaurants and inns as well as public transportation to the trails to be important or very important. Most hikers are very satisfied with the above-mentioned aspects.

Source: Swiss Hiking

SWISS PARKS

The park environment in Switzerland is taking shape. Following the dynamic changes of the past six years, the latest map (updated January 2015) includes 19 parks and park projects, representing more than 15 % of the area of Switzerland in 13 different cantons.

The Swiss National Park in the Engadine is the most well-known park in the country. It was established more than 100 years ago as the first national park in the Alpine region and it has its own legal basis. As of recently, two other Swiss parks have been seeking the national label: Parc Adula GR/TI and Parco Nazionale del Locarnese TI.

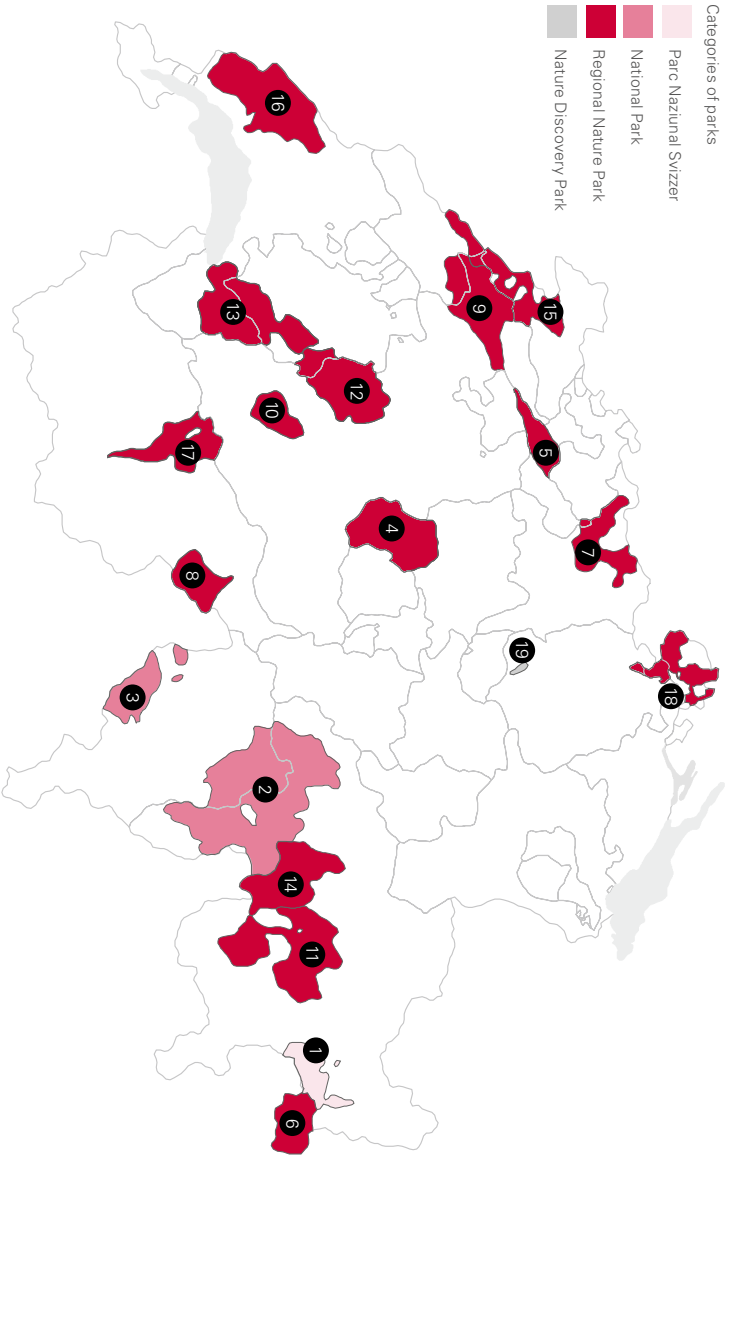
In addition to the national parks, Switzerland has 14 regional nature parks and a nature discovery park, all based on the Parks Ordinance (ParkO) of the amended Federal Act on the Protection of Nature and Cultural Heritage (NCHA) of 2007. One other nature park is in the planning phase (candidate): the regional nature park Schaffhausen SH. The perimeters of the «candidates» have not yet been finally established. The population will decide in the next few years whether their municipality will definitively contribute to the cost of the park.

Swiss park policy has been a success story: Regional nature parks have sprung up in all areas of the country. They turned into pillars of long-term regional growth, verifiably creating added value for the nature and the landscape, for society and the regional economy, the latter primarily in the areas of tourism and regional products. The national and nature discovery parks are focusing on the conservation of the landscape and natural processes (core zones). The natural landscape forms the basis for nature adventures and is thus also an attraction for regional tourism.

Studies on the value added by tourism in the UNESCO Biosphere Entlebuch (Knaus F., 2012) and the Biosphere Reserve Val Müstair Parc Naziunal (Backhaus N., 2013) have shown that 16 % of the visitors go there because of the Biosphere Entlebuch and as much as 36 % because of the Swiss National Park (so-called park visitors). They generate a total added value of CHF 6 million for the Entlebuch region and CHF 20 million for the Swiss National Park, which corresponds to six times the amount of the invested public funds (federal, cantonal and municipal).

Source: Swiss Parks Network

SWISS PARKS



FORMAL EDUCATION

BASIC VOCATIONAL EDUCATION AND TRAINING

ADVANCED FEDERAL CERTIFICATE (AFC)

Hotel and restaurant	Certificates of qualification issued		Apprentices hired	
	2014	2013	2014	2013
Hotel und Gastrofachmann/-frau	24	35	22	14
Hotelfachmann/-frau EFZ	323	295	348	338
Koch/Köchin EFZ	1567	1677	1772	1845
Restaurationsfachmann/-frau EFZ	594	661	579	648

Transport services

Matrose/Matrosin der Binnenschifffahrt	9	9	15	21
Seilbahn-Mechatroniker/-in EFZ	21	22	31	17

Economy and administration

Kaufmann/-frau B				
Hotel-Gastro-Tourismus	21	24	7	10
Öffentlicher Verkehr	18	6	0	3
Reisebüro	9	13	7	1
Transport	10	5	4	6
Kaufmann/-frau E				
Hotel-Gastro-Tourismus	196	201	149	141
Öffentlicher Verkehr	261	275	336	338
Reisebüro	171	149	171	180
Transport	26	34	29	30

BASIC FEDERAL CERTIFICATE (BFC)

Hotel and restaurant

Hotellerieangestellte/-r EBA	37	43	25	34
Küchenangestellte/-r EBA	272	302	367	334
Restaurationsangestellte/-r EBA	106	109	124	127
Seilbahner/-in	3	3	5	7

Source: Swiss Federal Statistical Office

HIGHER VOCATIONAL EDUCATION AND TRAINING: FINAL EXAMS

FEDERAL CERTIFICATES	Men	2014 Women	Total	2013 Total	2012 Total
Bereichsleiter/-in Hotellerie-Hauswirtschaft	2	79	81	74	85
Bereichsleiter/-in Restauration	7	23	30	30	3
Bergführer/-in	19	1	20	25	29
Cabin Crew Member	18	42	60	47	45
Chef de Réception	1	12	13	14	–
Chefkoch/Chefköchin	106	26	132	98	94
Fachmann/-frau im Pisten und Rettungsdienst	0	0	0	2	25
Gastro-Betriebsleiter/-in	44	24	68	62	57
Gastronomiekoch/-köchin	44	24	68	4	8
Schneesportlehrer/-in	102	31	133	121	174
Seilbahnfachmann/-frau	40	1	41	–	20
Tourismus-Assistent/-in	5	29	34	47	26

FEDERAL DIPLOMAS

Fachmann/-frau öffentlicher Verkehr	13	4	17	15	17
Gastro-Unternehmer	11	1	12	13	14
Küchenchef/-in	28	3	31	6	23
Leiter/-in Gemeinschaftsgastronomie	7	0	7	–	–
Leiter/-in Hotellerie – Hauswirtschaft	0	3	3	–	–
Leiter/-in Restauration	2	2	4	1	3
Manager/-in Gesundheitstourismus und Bewegung	4	6	10	–	11

DIPLOMA OF COLLEGES

Hauswirtschaftliche Betriebsleitung	0	23	23	31	22
Hotelier/-in – Restaurateur/-in	215	247	462	436	488
Tourismusfachmann/-frau	35	171	206	220	193

DIPLOMA OF UNIVERSITIES OF APPLIED SERVICES

Hotel sector – Certificates issued	216	288	504	450	383
Tourism sector (since 2008 Bachelor) – Certificates issued	31	133	164	200	173

Source: Swiss Federal Statistical Office

INTERNATIONAL

TOURIST ARRIVALS

According to the most recent statistics from the UNWTO World Tourism Organisation international arrivals have increased to 1.138 billion worldwide in 2014, 51 million more than in 2013. The 4.7% rise represents above-average growth for the fifth consecutive year since the economic crisis of 2009.

Broken down according to regions, America (+7%) and Asia/Pacific Region (+5%) achieved the highest increases, while the growth rates in Europe (+4%), the Middle East (+4%) and Africa (+2%) were more moderate.

	International arrivals in million		Change in %	
	2014 ¹	2013	2014 ¹ /13	2013/12
Europe	588.4	566.3	3.9	5.0
Northern Europe	72.6	68.0	6.9	4.1
Western Europe	175.6	171.8	2.2	2.7
Central/Eastern Europe	125.1	125.6	-0.4	7.6
Southern/Mediter. Europe	215.2	201.0	7.0	5.6
Asia and Pacific	263.0	249.8	5.3	6.8
North-East Asia	136.0	127.0	7.1	3.4
South-East Asia	96.6	94.3	2.4	11.3
Oceania	13.2	12.5	5.9	4.6
South Asia	17.1	16.0	7.1	11.4
Americas	180.6	168.1	7.4	3.5
North America	119.5	110.5	8.2	3.9
Caribbean	22.5	21.1	6.6	2.8
Central America	9.6	9.1	5.6	2.6
South America	29.0	27.4	5.7	2.7
Africa	56.0	54.7	2.3	4.8
North Africa	19.7	19.6	0.6	6.0
Subsaharan Africa	36.3	35.1	3.3	4.2
Middle East	50.3	48.2	4.4	-3.4
World	1 138	1 087.0	4.7	4.7

¹ Estimate

Source: World Tourism Organization (UNWTO)

TOP DESTINATIONS

Rank	Country of destination	International arrivals in million		Change in %	
		2013	2012	2013/12	2012/11
1	France	84.7	83.1	2.0	1.8
2	USA	69.8	66.7	4.7	6.8
3	Spain	60.7	57.5	5.6	0.3
4	China	55.7	57.7	-3.5	2.7
5	Italy	47.7	46.4	2.9	0.5
6	Turkey	37.8	35.7	5.9	3.0
7	Germany	31.5	30.4	3.7	7.3
8	United Kingdom	31.2	29.3	6.4	-0.1
9	Russia	28.4	25.7	10.2	13.4
10	Thailand	26.5	22.4	18.8	1.3
33	Switzerland	9.0	8.6	4.7	0.4

Rank	Country of destination	International tourism receipts in billion US-\$		Change in % based on local currency	
		2013	2012	2013 ¹ /12	2012/11
1	USA	173.1	161.2	7.4	6.9
2	Spain	62.6	58.2	4.1	1.2
3	France	56.7	53.7	2.1	6.3
4	Macao (China)	51.8	43.9	18.1	13.6
5	China	51.7	50.0	3.3	3.2
6	Italy	43.9	41.2	3.1	3.8
7	Thailand	42.1	33.8	23.1	26.7
8	Germany	41.2	38.1	4.5	6.3
9	United Kingdom	41.0	36.6	13.2	5.9
10	Hong Kong (China)	38.9	33.1	17.7	15.8
18	Switzerland	16.9	16.1	3.6	-0.6

¹ Estimate

Source: World Tourism Organization (UNWTO)

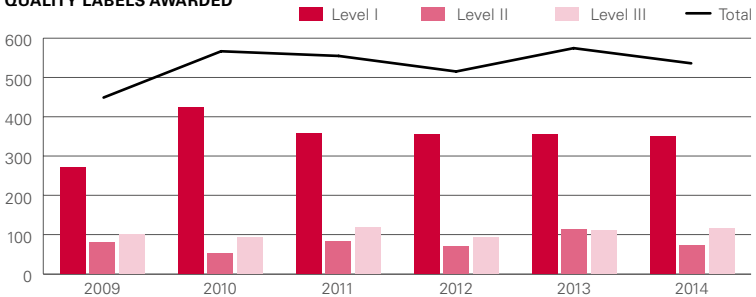
QUALITY PROMOTION

QUALITY PROGRAMME OF SWISS TOURISM



The Quality Programme enables businesses engaged in the tourism sector to examine, secure and specifically optimise the quality of services. The three-level programme is supported by eleven industry organisations.

QUALITY LABELS AWARDED

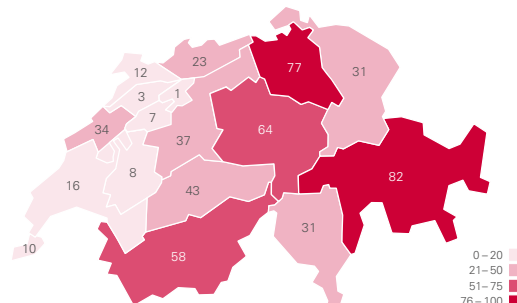


Since 1998 a total of 11 138 individuals have been trained and 7 666 quality labels have been awarded. As compared to 2013, Neuchâtel marks the largest increase in current Q-labels (+46%). With a plus of 21% the snow schools show the biggest increase within Switzerland.

LABELS PER INDUSTRY

Industry	Labels	in %	Industry	Labels	in %
Hotel industry	225	41.74	Gastronomy	50	9.28
Supplementary accommodation	79	14.66	Leisure and culture	26	4.82
Tourism organisations	55	10.20	Other	104	19.30
Total			Total	539	100.00

LABELS PER REGION



Source: Swiss Tourism Federation, Status as of 31.12.2014

FAMILY DESTINATION / WELLNESS DESTINATION



Since 1996 Swiss holiday destinations addressing their services to the needs and wishes of families can apply for the Family Destination quality label. In 2014, this quality label was awarded to 21 destinations.



Since 2008 the Swiss Tourism Federation has been awarding a Wellness Destination quality label to Swiss holiday destinations specialising in wellness services. In 2014 this quality label was awarded to 7 destinations.

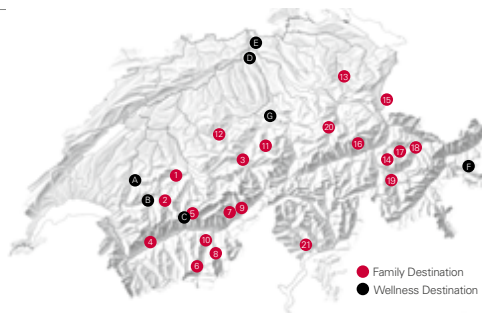
DESTINATIONS CARRYING THE LABEL

FAMILY DESTINATION 2013–2015 (STATUS: 2014)

Bernese Oberland	1 Diemtigtal 2 Lenk Simmental 3 Haslital with Hasliberg and Meiringen
Valais	4 Nendaz 5 Leukerbad 6 Zermatt-Matterhorn 7 Aletsch Arena with Riederalp, Bettmeralp, Eggishorn 8 Saas-Fee/Saastal 9 Bellwald 10 Grächen
Lucerne/ Lake Lucerne	11 Engelberg-Titlis 12 UNESCO Biosphere Entlebuch
Eastern Switzerland/ Liechtenstein	13 Toggenburg 14 Braunwald-Klausenpass 15 Triesenberg Malbun Steg
Graubünden	16 Flims, Laax, Falera with Trin and Sagogn 17 Arosa 18 Davos Klosters 19 Savognin 20 Lenzerheide
Ticino	21 Ascona Locarno

WELLNESS DESTINATION 2011–2014

Fribourg Region	A Charmey	Zurich Region	E City of Baden
Bernese Oberland	B Gstaad Saanenland	Graubünden	F Engadin Scuol
Valais	C Leukerbad	Lucerne/Lake Lucerne	G Weggis Vitznau Rigi
Bern Region	D Aargau ¹		



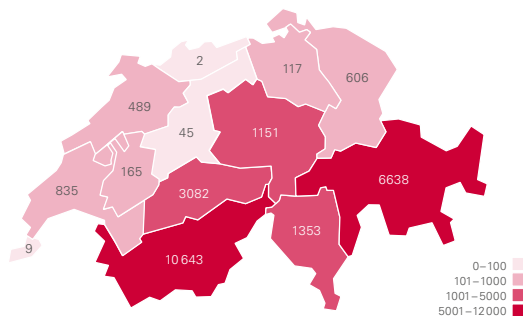
¹ Bad Zurzach, Bad Schinznach, Rheinfelden
Source: Swiss Tourism Federation



CLASSIFICATION OF HOLIDAY APARTMENTS AND GUEST ROOMS

The Swiss Tourism Federation classifications are aimed at providing an idea about the quality and services of holiday apartments and guest rooms in Switzerland. This results in a high level of transparency between the different providers.

AWARDED CERTIFICATES 2014



A detailed overview of the regional distribution is found on page 23 of this brochure.

Source: Swiss Tourism Federation

ENVIRONMENTAL AND SUSTAINABILITY LABELS



IBEX FAIRSTAY

'ibex fairstay' is a Swiss national certification label for sustainable lodging operations in the areas of ecology, social awareness, regionalism, economic efficiency and management, and granted at the bronze, silver, gold or platinum level. The better the performance, the higher the level of distinction. 'ibex basic' is a new simplified, professionally supported test module for sustainable management designed for newcomers and smaller operations. The Quality Programme of Swiss Tourism can be achieved or renewed simultaneously at all levels with 'ibex basic' or 'ibex fairstay'.

Year	2014	2013	2012	2011	2010
Certified companies	55	53	59	61	54

Source: ibex fairstay



EU ENVIRONMENTAL LABEL FOR LODGING ESTABLISHMENTS

The EU environmental label for lodging establishments is the only environmental certificate for hotel and non-hotel lodging operations recognized throughout Europe. It communicates to the guests that the management is concerned with issues of ecology. Compliance with the required criteria is ensured by on-site inspections.

The purpose of the label is to encourage lodging establishments to consider the ecology in their operations. In the medium- to long-term, the certified establishments are expected to decrease energy usage, reduce water consumption, lessen the amount of waste, increasingly use regional products and foster the environmental awareness of both staff and guests.

Year	2014	2013	2012	2011	2010
Certified companies	56	56	52	45	35

Source: SALADINO Umweltprojekte

OTHER LABELS



SAFETY IN ADVENTURES

The Safety in Adventures foundation has defined objectives to set a standard for outdoor and adventure activities. Commercial Providers develop and implement their own safety concept according to the management system of Safety in Adventures. This forms the basis for the certification and the awarding of the label by an independent body. Since 2014 certification is legally required for bungee, canyoning and rafting.

Year	2014	2013	2012	2011	2010
Certified companies	41	44	46	46	41

Source: Safety in Adventures

TOURISM ASSOCIATIONS AND INSTITUTIONS

Tourism interest groups and professional associations

Agritourism Switzerland

Brunnmattstrasse 21, 3007 Bern, phone +41 (0)31 359 50 30, www.agrotourismus.ch, info@agrotourismus.ch.
Umbrella organisation for the marketing and coordination of agritourist services in Switzerland with over 400 members.

Association of postgraduate Hoteliers-Restaurateurs SHV/Hotelmanager HF-NDS

Secretariat, P.O. Box 42, 8880 Walenstadt, phone +41 (0)79 833 81 75, www.vdh.ch, welcome@vdh.ch.
Networking, further education and friendship care for students of the postdiploma course 'Unternehmensführung resp. Nachdiplomstudium HF-NDS' of hotelleriesuisse.

Association of Swiss Tourism Managers (ASTM)

c/o FST, P.O. Box, 3001 Bern, phone +41 (0)31 307 47 43, fax +41 (0)31 307 47 48, www.vstm.ch, info@vstm.ch.
Representation of the professional interests of tourist office managers. Professional development, advisory service, lobbying.

Association of the Swiss Navigation Companies

Mythenquai 333, 8038 Zurich, phone +41 (0)43 243 16 57, fax +41 (0)43 243 16 58, www.vssu.ch, vssu@tic.ch.
Safeguarding the interests of the 16 member shipping companies.

Bed and Breakfast Switzerland

Sonnenweg 3, 4144 Arlesheim, phone +41 (0)61 703 00 83, fax +41 (0)61 703 96 76, www.bnb.ch, admin@bnb.ch.
Organisation of Swiss BnB host families. Purpose: information, promotion, publication of the 'Bed and Breakfast Switzerland Guide', quality standards.

Community of Interest of the Higher Schools of Tourism Management Switzerland

c/o Internationale Schule für Touristik AG (IST), Josefstrasse 59, 8005 Zürich, phone +41 (0)44 440 30 90, fax +41 (0)44 271 71 17, www.ist-zurich.ch, info@ist-zurich.ch. Safeguarding common interests towards the public authorities, associations and the general public, promotion of tourism management education and training in Switzerland.

CONTACT groups.ch – Hotels and Holiday Homes for Groups

Spitzackerstrasse 19, 4410 Liestal, phone +41 (0)61 926 60 00, fax +41 (0)61 911 88 88, www.groups.ch, www.seminar-groups.ch, contact@groups.ch. Organisation of the hotels and holiday homes for groups in Switzerland.
Services: rental agency (commission-free), worldwide marketing, consultation and settlement services, quality management, travel insurance specifically for groups, booking software www.groupsoffice.com.

GastroSuisse

Blumenfeldstrasse 20, P.O. Box, 8046 Zurich, phone +41 (0)848 377 111, fax +41 (0)848 377 112, www.gastrosuisse.ch, info@gastrosuisse.ch. GastroSuisse is the association for hotels and restaurants in Switzerland. Around 20000 members organised in 26 cantonal sections and 4 specialist groups belong to Switzerland's largest employers' association in the hospitality industry.

hotelleriesuisse

Monbijoustrasse 130, P.O. Box, 3001 Bern, phone +41 (0)31 370 41 11, fax +41 (0)31 370 44 44, www.hotelleriesuisse.ch, welcome@hotelleriesuisse.ch. hotelleriesuisse is the centre of excellence for the Swiss hotel industry and the trade association which represents the interests of the nationally and internationally oriented hotel establishments. The association is a member of the European Hotelstars Union.

Hotel & Gastro Union

Adligenswilerstrasse 29/22, P.O. Box 4870, 6002 Lucerne, phone +41 (0)41 418 22 22, fax +41 (0)41 412 03 72, www.hotelgastrounion.ch, info@hotelgastrounion.ch. Union of employees, professionals and management staff of the hotel/restaurant trade of bakers and confectioners.

Parahotellerie Switzerland

Schaffhauserstrasse 14, P.O. Box, 8042 Zurich, phone +41 (0)44 360 14 31, fax +41 (0)44 360 14 25, parahotellerie@youthhostel.ch. Representation of the interests of quality-conscious Swiss non-hotel establishments regarding tourism policy matters and the promotion of meaningful partnerships and activities. Members ensure direct quality definition/quality control and operate their own online reservation platforms. The current members are Bed and Breakfast Switzerland, Interhome AG, Swiss Travel Fund (Reka), Swiss Youth Hostels and TCS Schweiz (Camping).

SNOW SPORT INITIATIVE SWITZERLAND

Finkenhübelweg 11, P.O. Box, 3001 Bern, phone +41 (0)31 307 47 52, www.gosnow.ch, info@gosnow.ch. Association for the promotion of snow sports for children and adolescents at the national level through organised low-cost arrangements for schools.

Swiss Association of Public Transport

Dählhölzliweg 12, 3000 Bern 6, phone +41 (0)31 359 23 23, fax +41 (0)31 359 23 10, www.voev.ch, info@voev.ch. Protection of interests. Promotion of collaboration amongst the members. Information and consultation activities. Professional formation and further education.

Swiss Cableways

Dählhölzliweg 12, 3000 Bern 6, phone +41 (0)31 359 23 33, fax +41 (0)31 359 23 10, www.seilbahnen.org, info@seilbahnen.org. Representation of the common interests of the members vis-à-vis the authorities and the government, information of the media and the public regarding industry concerns, fundamental training, continuing education and training offered to employees at all levels, consultation for members regarding legal, financial, operational, technical, and administrative issues, periodic surveys regarding the industry's financial position.

swisscamps – Swiss Camping Association

Swiss Camping Association, Bahnhofstrasse 5, 3322 Schönbühl, phone +41 (0)31 852 06 26, fax +41 (0)31 852 06 27, www.swisscamps.ch, info@swisscamps.ch. Promotion of camping vacations and classification of camp sites.

Swiss Centre for mountain regions (SAB)

Seilerstrasse 4, P.O. Box 7836, 3001 Bern, phone +41 (0)31 382 10 10, www.sab.ch, info@sab.ch. Created in 1943. Lobbying for mountain regions and advisory services for projects in regional development.

SWISS CITIES

c/o Switzerland Tourism, Tödistrasse 7, 8027 Zurich, phone +41 (0)44 288 13 23, fax +41 (0)44 288 12 05, www.MySwitzerland.com/cities, swisscities@switzerland.com. Community of interests of 22 cities for the marketing in Switzerland and abroad.

Swiss Hiking Trail Federation

Monbijoustrasse 61, P.O. Box, 3000 Bern, phone +41 (0)31 370 10 20, fax +41 (0)31 370 10 21, www.wandern.ch, info@wandern.ch. Umbrella organisation of 26 cantonal hiking associations. Promotes hiking trails and hiking in Switzerland.

Swiss Hostels

Alpenstrasse 16, 3800 Interlaken, phone +41 (0)33 823 46 46, fax +41 (0)33 823 46 47, www.swisshostels.com, info@swisshostels.com. Industry organisation for independent hostels in Switzerland. Joint marketing, joint purchase, network and exchange, and strengthen the position of Swiss Hostels in the Swiss accommodation industry.

Swiss Parks Network

Monbijoustrasse 61, 3007 Bern, phone +41 (0)31 381 10 71, info@paerke.ch, www.paerke.ch. The Network is an umbrella organisation which administers the interests of its members and assists them in establishing and operating parks, as well as in ensuring their quality in the long-term. The 19 parks characterize themselves by their natural and cultural landscapes. They are engaged to protect and to valorize them.

SWISS SNOWSPORTS

Hühnerhubelstrasse 95, 3123 Belp, phone +41 (0)31 810 41 11, fax +41 (0)31 810 41 12, www.snowsports.ch, www.schweizer-skischule.ch, info@snowsports.ch, info@schweizer-skischule.ch. Alliance of tourism sector institutions interested in joint promotion of the Swiss Ski School system. Education of ski, snowboard, telemark and cross-country teachers.

Swiss Tourism Federation (STF)

Finkenhubelweg 11, P.O. Box, 3001 Bern, phone +41 (0)31 307 47 47, fax +41 (0)31 307 47 48, www.swisstourfed.ch, info@swisstourfed.ch. To safeguard the interests of those responsible for tourism in Switzerland and to participate in all tourism policy decisions; to provide information about the importance of tourism and to contribute to tourism research.

Swiss Travel Savings Fund (Reka) Cooperative

Neuengasse 15, 3001 Bern, phone +41 (0)31 329 66 33, fax +41 (0)31 329 66 01, www.reka.ch, info@reka.ch.

An organisation that promotes social tourism and the promotion of holidays, travel and leisure-time activities, particularly in Switzerland. It's core business is the issuance of payment instruments and the provision of holiday offerings.

Swiss Youth Hostels (SYH)

Schaffhauserstrasse 14, P.O. Box, 8042 Zurich, phone +41 (0)44 360 14 14, fax +41 (0)44 360 14 60, www.youthhostel.ch, contact@youthhostel.ch. Promotion of youth and family travel, accommodation for young travellers, youth groups, schools, families etc.

Switzerland Mobility

Spitalgasse 34, 3011 Bern, phone +41 (0)31 318 01 28, fax +41 (0)31 318 01 29, www.switzerlandmobility.ch, info@switzerlandmobility.ch. Quality assurance, information, development of national, regional and local offers for hiking, cycling, mountain biking, skating and canoeing.

Thermal Spas and Health Hotels Switzerland

Bahnhofstrasse 2, 9100 Herisau, phone +41 (0)71 350 14 14, fax +41 (0)71 350 14 18, www.kuren.ch, info@kuren.ch. Representing the interests of thermal spas, convalescent homes, clinics of rehabilitation and health hotels.

Touring Club Switzerland (TCS)

ch. de Blandonnet 4, 1214 Vernier, phone +41 (0)58 827 27 27, fax +41 (0)58 527 50 05, www.tcs.ch.

Assistance to persons in case of emergency all around the world, emergency road service in Europe, tourist service, to safeguard the interests of the motorists, legal counseling and support.

Public corporations

Swiss Association for Hotel Credit (SGH)

Uetlibergstrasse 134b, P.O. Box, 8027 Zurich, phone +41 (0)44 209 16 16, fax +41 (0)44 209 16 17, www.sgh.ch, info@sgh.ch. Financing, appraisals, consulting.

Switzerland Tourism (ST)

Tödistrasse 7, 8027 Zurich, phone +41 (0)44 288 11 11, fax +41 (0)44 288 12 05, www.MySwitzerland.com, info@myswitzerland.com. Offices in 26 countries. Increase the demand for Switzerland as a travel, holiday and congress destination.

Federal institutes

State Secretariat for Economic Affairs SECO

Tourism policy, Holzlikofenweg 36, 3003 Bern, phone +41 (0)58 462 27 58, fax +41 (0)58 463 12 12, www.seco.admin.ch.
Central federal authority for national and international tourism policies.

Swiss Federal Statistical Office (FSO)

Tourism section, Espace de l'Europe 10, 2010 Neuchâtel, phone +41 (0)58 467 24 40, fax +41 (0)58 463 62 15, www.tourismus.bfs.admin.ch, info-tour@bfs.admin.ch. To provide statistics on Swiss tourism (surveys on infrastructure, arrivals and overnight stays in hotels, camping places and youth hostels, tourism balance of payments, tourism satellite account and travel behavior).

Institutes of higher education

Institute of Systemic Management and Public Governance at the University of St. Gall (IMP-HSG)

Dufourstrasse 40a, 9000 St. Gall, phone +41 (0)71 224 25 25, fax +41 (0)71 224 25 36, www.imp.unisg.ch.
University lecturing, research, market research, consulting and expertising in the competence fields of tourism and transportation, regional economic, public management and integrative management.

Institute of Tourism ITW (Lucerne University of Applied Sciences and Arts)

Rösslimatte 48, P.O. Box 2940, 6002 Lucerne, phone +41 (0)41 228 41 45, fax +41 (0)41 228 41 44, www.hslu.ch/itw, itw@hslu.ch.
Study programmes and further education, applied research and consultation in the fields of destination management, sports & events, wellness and health, sustainability, e-tourism, leisure and tourism-related traffic and public transportation.

Institute for Tourism (ITO), HES-SO Valais (University of Applied Sciences and Arts Western Switzerland)

TechnoPôle 3, 3960 Sierre, phone +41 (0)27 606 90 01, fax +41 (0)27 606 90 00, www.hevs.ch, info.ito@hevs.ch.
BSc study programmes and further education, applied research and consulting especially in eTourism, monitoring and management tools in tourism, destination management, sustainable tourism, market research as well as feasibility and impact studies.

Institute for Tourism and Leisure (ITF) at the University of Applied Sciences HTW Chur

Comercialstrasse 22, 7000 Chur, phone +41 (0)81 286 24 56, fax +41 (0)81 286 39 49, www.itf.ch, itf@htwchur.ch.
BSc and MSC study programmes and further education (CAS, DAS, MAS, EMBA) in tourism and leisure management.
Applied research and consultation in the areas of eTourism, destination management, hospitality, client management and surveys and human environmental system.

University of Bern, Center for Regional Economic Development (CRED), Research Unit Tourism

Schanzeneckstrasse 1, P.O. Box 8573, 3001 Bern, phone +41 (0)31 631 37 11, www.cred.unibe.ch, info@cred.unibe.ch.
Teaching, research and services, in particular concerning regional-economics, impact research, sustainable development in tourism, quality of services and experience economy in tourism, macroeconomic questions.

International Tourism Organisations

European Travel Commission (ETC)

Rue du Marché aux Herbes 61, 1000 Brussels, Belgium, phone +32 2 502 01 13, fax +32 2 514 18 43, www.etc-corporate.org,
info@etc-corporate.org.

EUROSTAT

Joseph Bech Building, 5, rue Alphonse Weicker, 2721 Luxembourg, phone +35 2 4301 33444, fax +35 2 4301 35349,
www.ec.europa.eu/eurostat, estat-esac@ec.europa.eu.

Hotels, Restaurants & Cafés in Europe (HOTREC)

111, Boulevard Anspach, P.O. Box 4, 1000 Brussels, Belgium, phone +32 2 548 90 00, fax +32 2 502 41 73, www.hotrec.eu,
hotrec@hotrec.eu.

World Tourism Organization (UNWTO)

Capitán Haya 42, 28020 Madrid, Spain, phone +34 91 567 81 00, fax +34 91 571 37 33, www.unwto.org, wtobc@unwto.org.
