2020

16

Culture, media, information society, sports

Neuchâtel 2021

Cultural economy in Switzerland

Cultural enterprises and cultural workers

Schweizerische Eidgenossenschaft
Confédération suisse
Confederazione Svizzera
Confederaziun svizra

Swiss Confederation

Federal Department of Home Affairs FDHA
Federal Statistical Office FSO

Published by: Federal Statistical Office (FSO)

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Editors: Jürg Furrer, FSO; Olivier Moeschler, FSO

Series: Swiss Statistics

Topic: 16 Culture, media, information society, sports

Original text: German

Translation: FSO language services

Layout: DIAM Section, Prepress/Print

Graphics: DIAM Section, Prepress/Print

Online: www.statistics.admin.ch

Print: www.statistics.admin.ch
Federal Statistical Office, CH-2010 Neuchâtel,
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Printed in Switzerland

FSO number: 2058-2000

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1 Introduction

While maximising profitability and making profit are not the primary goals of the cultural sector, it does have economic aspects. Besides its cultural values, it also creates economic value and jobs, and generates income. This is what the statistics on the cultural economy are concerned with.

The economic aspect of culture has been a focus for some years in Switzerland, but also in Europe and worldwide. For example, UNESCO published its first global Creative Economy Report in 2013. In Switzerland, a number of cantons (Zurich, Geneva, Valais) have drawn up their own cultural economy reports, and the first national studies have been published (Weckerle et al. 2003).

The definition of the cultural economy used in this report is geared towards the Eurostat guidelines, as set out in 2012 (European Commission 2012, EU 2018) and on which there is a Europe-wide consensus. They are based on a rather traditional understanding of culture, but extended to include sectors where creativity plays a key role, such as architecture, the video game industry, arts and crafts, and advertising. As opposed to the broader creative economy approach, which also comprises the fields of IT, software and marketing (Bakhshi et al. 2013; Weckerle et al. 2010, 2016, 2018, 2020), here the focus is on culture in the stricter sense. Eurostat distinguishes 10 main cultural domains, plus one additional transversal domain: cultural education (see box).

What belongs to culture from a statistical point of view?

The cultural sector comprises the following 11 domains:

1. Heritage (museums, monuments)
2. Archives
3. Libraries
4. Books and press
5. Visual arts (painting, sculpture and statuary, photography, design, fashion)
6. Performing arts (theatre, opera, concerts, dance)
7. Audio-visual and multimedia (film, radio, television, video games), excluding general software
8. Architecture
9. Advertising
10. Art crafts
11. Cultural education (transversal)

The cultural economy can be analysed and described according to two complementary aspects:

- based on cultural enterprises, i.e. cultural enterprises with their workplaces and jobs in the specified cultural sector comprising 11 cultural domains, e.g. museums, theatres, publishing houses, and architecture firms. Chapters 2 and 3 look at this aspect;
- based on the person-oriented approach, which focuses on people who work in the cultural sector, whatever their occupation, and on people with a cultural occupation who work outside of the cultural sector; this is described in chapters 4 and 5.

The definition of cultural occupations is also based on the Eurostat guidelines (see chapter 4 and the methodology section in the annex).

The figures presented here are composite statistics based on various existing surveys conducted by the Federal Statistical Office (FSO), which partly concern enterprises and jobs, and partly economically active persons (see box). The analyses, which were compiled on behalf of the Federal Office of Culture (FOC), are based on established definitions, surveys and methods. The FSO is thereby making a substantial contribution to the discussion on the economic aspects of culture, with facts and figures from official statistics.

The sources of the cultural economy statistics

The results in chapters 2 and 3, which focus on enterprises and jobs, are based on the structural business statistics (STATENT), business demography statistics (UDEMO), and the production and value added statistics (WS). The figures on cultural workers in chapters 4 and 5 are based on the Swiss Labour Force Survey (SLFS), the Swiss Earnings Structure Survey, and the Survey on Income and Living Conditions (SILC).

2 Cultural enterprises: number, size and distribution

The enterprise-based approach looks at the sectors that make up the 11 cultural domains according to Eurostat (see methodology section in the annex).

2.1 Number of enterprises, workplaces and jobs

One in ten enterprises belongs to the cultural sector

In 2018, the cultural sector comprised 63 639 enterprises (or 59 474 excluding cultural education) and 66 122 workplaces, i.e. subsidiaries or production sites (61 760 excluding cultural education; see Table T 1). By way of comparison, in the overall economy there were 608 952 enterprises, most of which (around 76%) were in the tertiary sector, and 687 022 workplaces. The cultural sector therefore accounts for around 10.5% of enterprises and 9.6% of workplaces.

STATENT
The structural business statistics (STATENT) cover all enterprises that are required to pay OASI contributions for their employees and for themselves (self-employed persons) if they generate an annual income of CHF 2300 or more. They are based on data from the old age and survivors' insurance (OASI) register and on information from the FSO's Business and Enterprise Register (BER).

The fact that the number of businesses and workplaces is similar indicates that only very few enterprises operate several workplaces. In fact, this is the case for only 1.2% of cultural enterprises. Table T 1 shows that in the two domains *Heritage* and *Archives/Libraries*, there are significantly more workplaces than enterprises. However, the vast majority of enterprises only has one workplace (98.8%). One reason for this is also that businesses in the cultural sector are relatively small (see section 2.3).

Cultural enterprises and workplaces (number and share), 2018 T1

Cultural domain	Enterprises		Workplaces	
	Number	Share in %	Number	Share in %
1. Heritage	285	0.4%	447	0.7%
2./3. Archives/ Libraries	224	0.4%	673	1.0%
4. Books and press	7 710	12.1%	8 754	13.2%
5. Visual arts	19 447	30.6%	19 485	29.5%
6. Performing arts	9 964	15.7%	10 051	15.2%
7. Audio-visual and multimedia	3 645	5.7%	3 802	5.7%
8. Architecture	13 430	21.1%	13 703	20.7%
9. Advertising	3 684	5.8%	3 746	5.7%
10. Art crafts	1 085	1.7%	1 099	1.7%
11. Cultural education (transversal)	4 165	6.5%	4 362	6.6%
Total cultural sector	**63 639**	**100%**	**66 122**	**100%**
Total overall economy	**608 952**	**10.5%**	**687 022**	**9.6%**

Source: FSO – Statistics on the cultural economy; STATENT

The number of cultural enterprises grew on balance by 13.0% between 2011 and 2018 – and thus much more sharply than the number of enterprises in the overall economy (+7.4%). The number of workplaces increased by 11.5% (overall economy: +6.8%). The section on enterprise births will examine how many new cultural enterprises were actually set up (see section 3.2).

Measured in terms of enterprises (workplaces also result in very similar values), the largest cultural domain is *Visual arts* with a share of around 30% (2018). This domain saw the strongest growth between 2011 and 2018 (+26%). The second-largest cultural domain is *Architecture* with a share of 21% (+3.9%), followed by *Performing arts* (16%), which also saw above-average growth of 24% between 2011 and 2018.

Over 230 000 jobs in the cultural sector

Another parameter used to determine the significance of the cultural economy is the number of jobs it represents. In 2018, the cultural sector had 234 494 jobs (214 367 excluding cultural education). Converted to full-time jobs, this equates to 161 433 full-time equivalents (FTEs). This indicates that a relatively large number of jobs in the cultural sector are part time. How do these figures rank compared with the overall economy? In 2018, there were 5.2 million jobs in Switzerland, which equates to 4.1 million FTEs (see Table T 2).

Jobs and full-time equivalents (number and share), 2018 — T 2

Cultural domain	Jobs		FTEs	
	Number	Share in %	Number	Share in %
1. Heritage	6 864	2.9%	4 162	2.6%
2./3. Archives/ Libraries	5 572	2.4%	3 393	2.1%
4. Books and press	49 760	21.2%	37 723	23.4%
5. Visual arts	29 659	12.6%	19 465	12.1%
6. Performing arts	25 861	11.0%	13 670	8.5%
7. Audio-visual and multimedia	21 304	9.1%	14 901	9.2%
8. Architecture	54 397	23.2%	44 048	27.3%
9. Advertising	16 979	7.2%	11 768	7.3%
10. Art crafts	3 971	1.7%	3 377	2.1%
11. Cultural education (transversal)	20 127	8.6%	8 926	5.5%
Total cultural sector	**234 494**	**100%**	**161 433**	**100%**
Total overall economy	**5 249 958**	**4.5%**	**4 113 221**	**3.9%**

Source: FSO – Statistics on the cultural economy; STATENT

At 4.5%, the share of cultural sector jobs as a percentage of the total workforce is much smaller than the share of cultural enterprises as a percentage of all enterprises. This is a reflection of the fact that enterprises in the cultural sector are smaller on average, and so have fewer jobs than enterprises in the overall economy.

The number of jobs in the cultural sector increased by 2.1% between 2011 and 2018, which is significantly less than the growth in the number of enterprises and workplaces. Cultural enterprises are therefore getting smaller, with the average number of jobs per workplace falling from 3.9 to 3.5. In the overall economy, the average number of jobs per workplace is higher, at 7.6.

The significance of the individual cultural domains varies depending on whether we measure them based on the number of jobs or the number of enterprises or workplaces. While most enterprises belong to the domain *visual arts*, most jobs are in *Architecture* (23.2%), with 21.2% in *Books and press*, and 12.6% in *Visual arts*.

2.2 Regional distribution

In order to examine regional distribution, it makes sense to look at workplaces and jobs as they allow a more detailed analysis.

The language regions display certain variations from the Switzerland-wide pattern. In terms of workplaces, German-speaking and French-speaking Switzerland have a similar structure: *Visual arts*, *Architecture* and *Performing arts* are the most important domains. In French-speaking Switzerland, the domain of *Books and press* is proportionally greater (16.1% compared with the Swiss average of 13.2%). In the Italian-speaking region, it is noticeable that *Architecture* (with a share of 29.6%) is much more significant than in the other language regions and *Visual arts* (with a share of 8.4%) is much less significant.

If we look at jobs, the domains of *Architecture, Books and press*, and *Visual arts* are the most important domains in all language regions (see Table T3). It is striking that in Italian-speaking Switzerland *Audio-visual and multimedia* have an above-average significance (at 19.1%) and – as is the case for workplaces – *Performing arts* has a below-average significance (at 6.3%).

Cultural enterprises are particularly well represented in urban areas. In 2018, 75% of workplaces were based in urban areas, 10% in rural areas and 15% in intermediate areas that have both urban and rural characteristics (spatial classification: see methodology section in the annex). Larger deviations from this general pattern emerge in the domains of *Performing arts*, which are distributed somewhat more evenly (69% urban, 14% rural, 17% intermediate), and *Audio-visual and multimedia*, which is highly urban (82% urban, 7% rural, 12% intermediate).

Share of cultural domains in the language regions measured by number of jobs, 2018 — T 3

Cultural domain	German- and Romansh-speaking Switzerland	French-speaking Switzerland	Italian-speaking Switzerland	Switzerland
1. Heritage	2.6%	4.1%	2.1%	2.9%
2./3. Archives/Libraries	2.1%	3.2%	2.0%	2.4%
4. Books and press	22.2%	18.9%	16.6%	21.2%
5. Visual arts	12.3%	13.0%	15.7%	12.6%
6. Performing arts	10.9%	12.3%	6.3%	11.0%
7. Audio-visual and multimedia	8.0%	10.6%	19.1%	9.1%
8. Architecture	23.6%	21.6%	24.4%	23.2%
9. Advertising	8.4%	4.0%	5.5%	7.2%
10. Art crafts	1.0%	3.9%	2.8%	1.7%
11. Cultural education (transversal)	8.8%	8.5%	5.5%	8.6%
Total cultural sector	**100%**	**100%**	**100%**	**100%**

Source: FSO – Statistics on the cultural economy; STATENT

The differences between workplaces and jobs are interesting: the figures for jobs are 83% in urban areas, 6% in rural areas and 11% in intermediate areas. This indicates that not only the most, but also the largest, workplaces tend to be based in urban areas. The domains *Audio-visual and multimedia* (93% urban) as well as *Heritage* (91%) and *Archives/Libraries* (87%) are particularly urban.

2.3 Type and structure of cultural enterprises

While the previous section examined enterprises, workplaces and jobs, this section focuses solely on enterprises.

Usually few jobs per enterprise

The cultural sector comprises 60 082 enterprises with 1 to 9 employees. This equates to 94.4% of all cultural enterprises. In the cultural sector, there are 3147 businesses with 10 to 49 employees (4.9%) and 410 businesses with 50 or more employees (0.6%), of which 37 enterprises have 250 employees or more. These results are in line with the findings from other countries as cultural enterprises are traditionally characterised by their small size (Söndermann et al. 2009: 8f.; Eurostat 2019: 91f.). The domains of *Heritage* and *Archives/Libraries* have a relatively high proportion of large enterprises, while the domains of *Visual arts* and *Performing arts* have a relatively high proportion of smaller enterprises.

Many cultural enterprises are sole proprietorships

The size structure of cultural enterprises is reflected in their legal form. Well over half of cultural enterprises are sole proprietorships, at 39 595 or 62.2%. Other important legal structures are limited liability companies (GmbH) (10 515 or 16.5%), companies limited by shares (Aktiengesellschaft) (11.7%), and associations (6.7%). By the very nature of the individual cultural domains, deviations from this structure become apparent. In the two domains *Visual arts* and *Cultural education*, the proportion of sole proprietorships is over 80%. In *Heritage*, 50.5% of enterprises are foundations, while in *Archives/Libraries* this figure is 16.5%.

99.3% of cultural enterprises are market enterprises, and only a small proportion (0.7% or 429) are non-market enterprises, in other words – according to the European System of Accounts definition – their sales make up less than 50% of their production costs. The cultural domains that are generally non-market-oriented include *Heritage* and *Archives/Libraries*: in these two cultural domains, 79% and 77% of enterprises respectively cover less than half their costs through revenue from the sale of products and services.

3 Macroeconomic importance and development of cultural enterprises

To analyse economic importance, this chapter only considers the cultural sector's business economy, i.e. those parts of the economy that are profit-oriented and that implement strategies to increase their productivity. This definition of the business economy excludes public administration and non-profit institutions serving households (NPISHs).[1]

The sample used for the production and value added statistics (WS) to calculate the monetary values is too small and contains too few data to allow statistically substantiated conclusions to be drawn for 10 or 11 cultural domains. For the macroeconomic analysis of economic significance, the cultural domains were therefore consolidated into four groups that have a substantive connection:

- Group A: *Heritage* (museums, monuments), *Archives/Libraries* and *Architecture* (domains 1, 2, 3 and 8)
- Group B: *Books and press*, *Audio-visual and multimedia* (domains 4 and 7)
- Group C: *Visual arts* and *Performing arts* (domains 5 and 6)
- Group D: Other cultural domains (*Advertising*, *Art crafts* and *Cultural education*; domains 9, 10 and 11)

Production and value added statistics

The production and value added statistics (WS) use accounting results to survey the structure and trends of business activities in the various sectors of economic activity. The statistical population is comprised of enterprises based in Switzerland employing at least three persons (including the owners of the enterprise); estimates are made for smaller enterprises. The gross sample comprises approximately 22 000 enterprises.

1 This corresponds to sectors S13 (general government) and S15 (non-profit institutions serving households) in the European System of Accounts.

3.1 Economic importance

This section analyses the cultural sector's value added and contribution to growth.

The value added of the cultural economy is over 2% of gross domestic product (GDP)

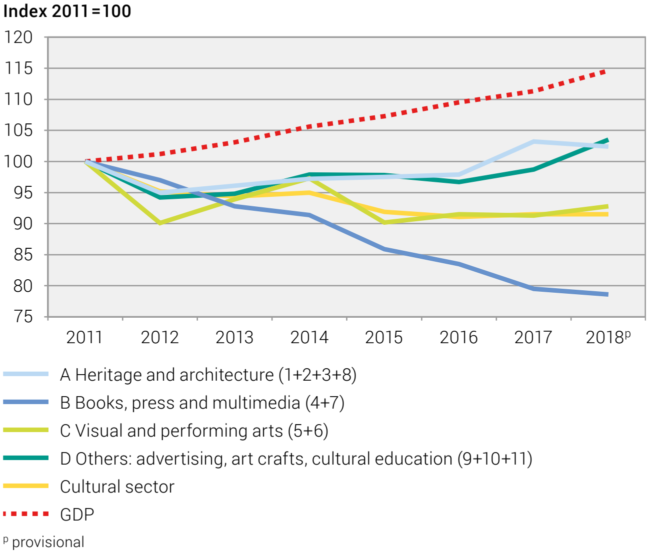
In 2018, the value added of the cultural economy amounted to a total of CHF 15.2 billion at current prices. This equates to 2.1% of GDP, i.e. of total value added, or 2.6% of the value added of the business economy. By way of comparison, Eurostat recorded a figure of 2.3% for the 27 EU member states in 2017. A similar calculation for France gives a figure of 2.3% (Eurostat 2020b, Turner 2019; see methodology section in the annex).

Group A (*Heritage, Architecture*) and Group B (*Books and press*, *Audio-visual and multimedia*) make up the largest shares, at CHF 5.8 billion and CHF 5.6 billion respectively. Of the individual cultural domains, Architecture and Books and press in particular make a large contribution to the cultural sector's value added.

Measured in terms of value added, the cultural sector has seen little dynamic growth overall in recent years (see Graph G1). In 2018, the amount of value added (adjusted for inflation)[2] was lower than in 2011, shrinking by –1.3% per year on average. GDP grew by an annual average of +2.0% in the same period. The (negative) growth of the cultural sector was mainly caused by Group B (*Books and press*, *Audio-visual and multimedia*), in particular the negative performance of the domain *Books and press*. Group A (*Heritage* and *Architecture*) performed above average, with *Architecture* in particular driving the positive result, as well as Group D (*Advertising, Art crafts* and *Cultural education*). Group C (*Visual arts* and *Performing arts*) has seen a somewhat volatile development.

2 At previous-year's prices, reference year 2015

Gross value added of the cultural sector and the overall economy (GDP at previous year's prices) G1



Source: FSO – Statistics on the cultural economy; NA, WS

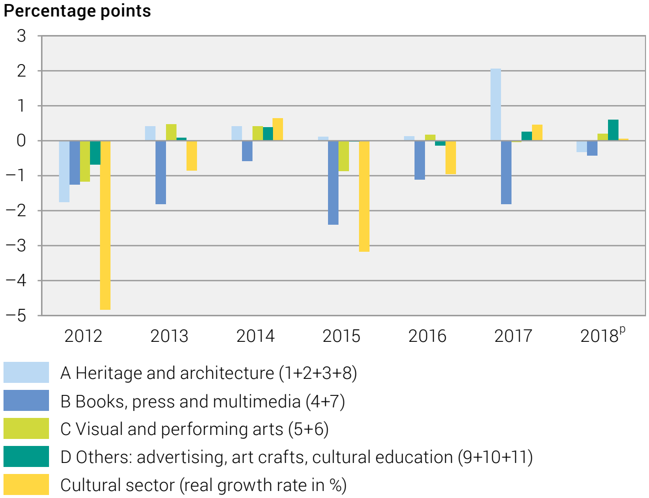
Cultural enterprises contribute little to growth

The contribution of culture to GDP growth can be calculated by weighting the growth rate of the cultural sector based on its share of the overall economy. However, this contribution to growth is small and for a number of years was negative. Between 2012 and 2018, the cultural sector's contribution to growth fluctuated between –0.12 (2012) and +0.01 percentage points (2014 and 2017). The contributions to growth of Group B (*Books and press, Audio-visual and multimedia*) were almost consistently negative. The three other groups made a positive contribution to economic growth for four to five years (see Graph G 2).

3.2 Development of cultural enterprises – enterprise births and survival rates

As in section 3.1 on economic significance, here we only take account of the business economy and not the whole cultural sector.

Cultural domains' contribution to growth (at previous year's prices) G 2



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Source: FSO – Statistics on the cultural economy; NA, WS

Between 5000 and 6000 new cultural enterprises every year

An enterprise birth is when an enterprise is set up from scratch and begins operations. Enterprises that are the result of mergers, takeovers, break-ups or restructuring are not taken into account here.

In the period from 2013 to 2017, there were between 5000 and 6000 enterprise births in the cultural sector every year, creating 6000 to 7000 new jobs. In 2017, there were 5140 enterprise births, which equated to 6182 new jobs. The overall economy recorded 39 303 enterprise births in 2017 (with 53 480 jobs), particularly in the tertiary sector. The cultural economy therefore accounted for 13.1% of enterprise births and 11.6% of new jobs. These shares are greater than those of the cultural sector in the overall economy. There was a particularly large number of enterprise births in *Visual arts* (1982 enterprises), *Performing arts* (859), and in *Architecture* (768), in other words those domains in which there are already many enterprises (see section 2.1).

UDEMO
The business demography statistics (UDEMO) comprise various statistics on the characteristics and number of Swiss enterprises. They are based on data from the old age and survivors' insurance (OASI) and on information from the FSO's Business and Enterprise Register (BER). The data are supplemented by surveys of businesses.

Strong growth in architecture

According to the FSO definition, a high-growth enterprise is one that has at least ten employees at the start of the observation period (t–3 years) and whose average annualised growth in headcount is above 10% over a three-year period. It should be borne in mind that cultural enterprises tend to be small and very often have fewer than ten employees. Compared with the overall economy, there are therefore relatively few cultural enterprises considered "high-growth". In the most recent year for which data are available (2017), 221 cultural enterprises with 6516 jobs were defined as high-growth enterprises. Again, the most dynamic businesses were in the domains of *Architecture* (98 enterprises with 2653 jobs), followed by *Performing arts* (31 enterprises with 1110 jobs) and *Books and press* (22 enterprises with 684 jobs).

By way of comparison, there were 4186 high-growth enterprises (accounting for a total of 226 143 jobs) in the overall economy in 2017.

Survival rate slightly lower than in the overall economy

As with enterprise births, the statistics on enterprise deaths only comprise businesses that definitively ceased operations and here too, they do not include mergers, acquisitions, break-ups or restructuring.

In 2013, 3975 cultural enterprises exited the market (this equates to 4967 jobs), while in 2015 – the most recent year for which statistics are available – the corresponding figures were 4567 enterprises and 5417 jobs. Enterprises in *Visual arts* made up the greatest share (1620 enterprises), followed by *Architecture* (763) and *Performing arts* (681), i.e. those domains that make up a large proportion of the cultural sector (see section 2.1) and in which there are many enterprise births. In the overall economy, 35 484 enterprise deaths were recorded in 2015, equating to a loss of 48 720 jobs.

The survival rate of new cultural enterprises is around 80% after one year, just under 70% after two years and just over 50% after four years. There are no major deviations from this general pattern in the individual cultural domains – with the exception of *Heritage* and *Archives/Libraries*. However, there are very few enterprise births in these cultural domains, which is why the values are hard to interpret.

The survival rate of cultural enterprises is slightly lower than that of the overall economy (see Table T4).

Survival rate of new enterprises in the cultural sector and in the overall economy T4

	Percentage of surviving enterprises after	Cultural economy	Overall economy
Enterprise birth 2013	one year (2014)	82.4%	83.9%
	two years (2015)	69.8%	70.9%
	three years (2016)	61.2%	61.7%
	four years (2017)	53.8%	54.6%
Enterprise birth 2014	one year (2015)	80.6%	82.1%
	two years (2016)	66.5%	68.7%
	three years (2017)	56.6%	59.3%
Enterprise birth 2015	one year (2016)	81.7%	83.0%
	two years (2017)	70.1%	70.8%
Enterprise birth 2016	one year (2017)	81.9%	83.6%

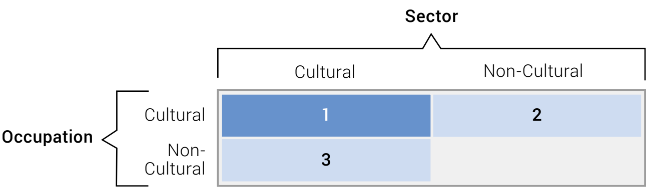
Source: FSO – Statistics on the cultural economy; UDEMO

4 Cultural workers: number, profile and distribution

In addition to the cultural enterprise approach, the cultural economy can also be described in terms of cultural workers. There are three potential combinations between cultural occupations and cultural domains that allow a more comprehensive understanding of "cultural workers" (see Graph G 3):

1. People holding a cultural occupation in the cultural sector (e.g.: *musician in an orchestra*)
2. People holding a cultural occupation but outside of the cultural sector (e.g.: *photographer in a chemicals company*)
3. People holding a non-cultural occupation in the cultural sector (e.g.: *accountant in a theatre*)

Cultural workers: classification by occupation and sector **G 3**



Source: Eurostat, ESSnet Culture, 2012 © FSO 2020

The domains defined as cultural are listed in chapter 1. The occupations that may be deemed "cultural" were defined by Eurostat together with the cultural domains. They are defined as "occupations involved in the creative and artistic economic cycle i.e. creation, production, dissemination and trade, preservation, education, management and regulation, as well as heritage collection and preservation" (European Commission 2012: 144; see methodology section in the annex).

According to the approach adopted at European level, combinations 1, 2 and 3 are considered together and individually, where 1 and 3 together correspond to the cultural sector with the 11 cultural domains analysed in the enterprise perspective; however, combination 2 is calculated in addition. The deciding factor is always the main occupation, so in the case of several occupational activities, the one that takes up the most time. People who do artistic activities "as a sideline" are thus not included. This focus on main occupations results in an under-estimation of the actual number of cultural workers, despite inclusion of cultural workers from outside the cultural sector.

4.1 Number of cultural workers

The following section – instead of looking at jobs, as in section 2.1 – looks at people, usually *economically active persons*, i.e. all available workers from 15 years of age, regardless of whether they are employed, out of work or looking for work. Where it makes sense for the analyses (e.g. for work-time percentage, journey to work etc.), it describes *employed persons*, i.e. those who are actually working, including apprentices.

Over 300 000 cultural workers

In 2019, there were 312 000 cultural workers in Switzerland, which equates to 6.3% of Switzerland's total working population. The analysis shows that the largest group is those who work in the cultural sector but do not hold a cultural occupation (36%). People who hold a cultural occupation in a cultural sector account for 32% of cultural workers. Table T5 also shows that cultural workers who work outside of the cultural sector make up the same proportion (32%).

Cultural workers (economically active persons) according to classification, 2019 **T5**

Occupation	Sector		Total
	Cultural	Non-cultural	
Cultural	98 982 **(32%)**	100 227 (**32%**)	199 209
Non-cultural	112 973 **(36%)**	–	112 973
Total	**211 955**	**100 227**	**312 182 (100%)**

Source: FSO – Statistics on the cultural economy; SLFS

Compared with 2010, the number of cultural workers increased by 12.3% (from 278 000), while the overall economy grew by +11.4%. There are differences between the individual cultural domains: while the proportion of cultural workers in the domain *Books and press* fell sharply (from 23% to 16%), the proportion of cultural workers in *Visual arts* (from 7% to 10%) and *Architecture* (15% to 19%) increased.

Main source of data on cultural workers: the SLFS
The Swiss Labour Force Survey (SLFS) has been providing information on the structure of the labour force and employment behaviour patterns of the resident population since 1991. Since 2010, it has been based on a quarterly survey with 126 000 interviews conducted annually (each respondent is surveyed four times over an 18-month period) and covers all employment situations, including self-employment. The SLFS is compatible with OECD and EU data.

By international comparison – calculated on the basis of Labour Force Studies (LFS)[1] – Switzerland is at the upper end of the table with 5.4% of cultural workers, alongside countries such as Iceland, Malta, Estonia, Luxembourg and Finland.

Quite low work-time percentage

Around half (49%) of the cultural workforce (employed persons) worked full-time in 2018 (in other words a work-time percentage of 90% or more). The proportion of full-time workers is therefore much lower than in the overall economy (63%). The gender split plays a role here. While 65% of male cultural workers worked full-time in 2019, this was only the case for 33% of female cultural workers. There is a difference in the overall economy, too; however, the proportion of women is higher among cultural workers, as we will see below (see section 4.2). The proportion of full-time workers has decreased since 2010 (from 56% to 49%), similar to the trend in the overall economy (from 66% to 63%).

Within the cultural sector, full-time work is more widespread in the domains *Architecture* (where 68% of cultural workers work full-time), *Audio-visual and multimedia* (58%), *Art crafts* (56%) and *Books and press* (55%), while this is much less common in Performing arts (48%), *Visual arts* (47%), *Archives/Libraries* (25%) and *Heritage* (23%). Outside of the cultural sector, only 42% of cultural workers worked full-time in 2019.

[1] Certain 4-digit NOGA codes are missing because they are not available in some countries (4761, 4762, 4763; 5821; 6391; 7111; 7311; 7722 as well as 3212 and 8552).

Fewer unemployed persons than in the overall economy

Of the 312 000 cultural workers, 302 000 were economically active (employed persons, including apprentices). The unemployment rate – calculated according to international conventions (ILO, see methodology section in the annex) – amounted to 3.2% among cultural workers in 2019. This figure is lower than in the overall labour market (4.4%). However, there is greater variation: while the unemployment rate in Switzerland has ranged from 4.4% to 4.9% since 2010, in the cultural sector it has fluctuated between 3.2% and 4.2%.

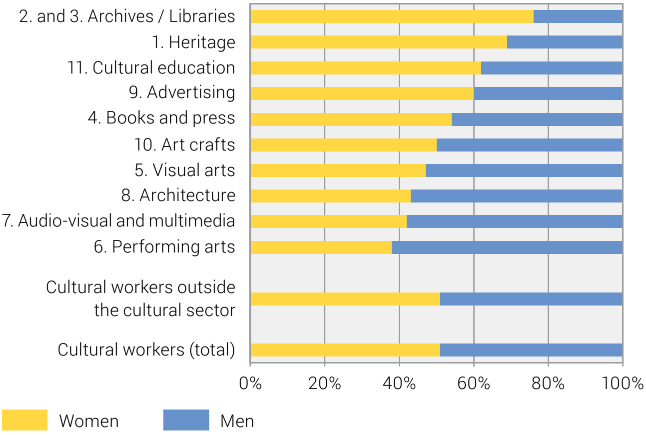
4.2 Profile of cultural workers

Female and male dominated cultural domains

The cultural economy tends to be more female: at 51%, the proportion of women in 2019 was higher than in the overall economy (47%). The proportion of women has also increased slightly: from 48% in 2010 to 51% in the cultural economy, which is significantly more than in the overall economy (from 46% to 47%).

In the cultural sector itself, women are clearly in the majority in *Advertising* (60%), *Cultural education* (62%), Heritage (69%) and – to an even greater extent – *Archives/Libraries* (76%), while there are more men in *Performing arts* (62%), *Audio-visual and multimedia* (58%) and *Architecture* (57%). Among cultural workers active outside the cultural sector, the gender ratio is exactly 50:50 (see Graph G 4).

Cultural workers: gender splits, total and by cultural domain, 2019 G 4



Source: FSO – Statistics on the cultural economy; SLFS

Slightly older than in the overall economy

Cultural workers are slightly older on average (43.5 years old in 2019) than workers in the overall economy (41.9 years old). The age of workers is above average in some cultural domains. This is the case in *Heritage* (48.9 years), *Cultural education* (48.0 years), *Visual arts* (47.4 years), *Performing arts* (46.4 years) and *Books and press* (44.8 years). Workers are comparatively younger in *Architecture* (39.9 years) and *Audio-visual and multimedia* (38.3 years).

Other nationalities less present

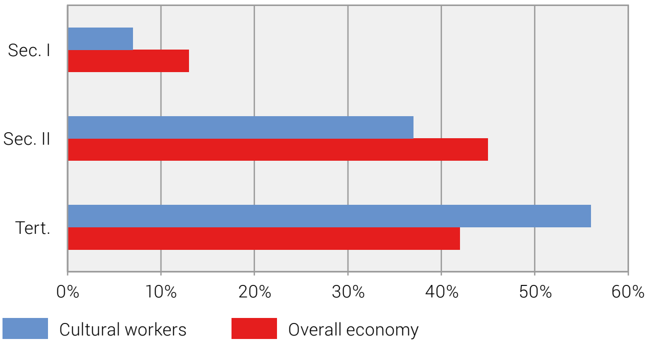
At 80% (2019), the vast majority of cultural workers (economically active persons) are Swiss nationals, although that proportion has fallen slightly since 2010 (82%). Swiss nationals make up a much greater proportion of the cultural sector than of the overall economy (73%). The proportion of Swiss citizens is marked in *Archives/Libraries* (90%), *Heritage* (88%) and *Art crafts* (88%), and is slightly lower in *Architecture* (79%), *Cultural education* (78%) and *Advertising* (77%).

The proportion of Swiss cultural workers is much higher in German-speaking Switzerland (82%) than in Italian-speaking and French-speaking Switzerland (76% and 74%, respectively). Of the seven major regions, the proportion of Swiss cultural workers is highest in Espace Mittelland (86%) and in Central Switzerland (85%), and is lowest in the Lake Geneva region (73%) and Ticino (74%). These regional differences reflect those of the overall economy, although the proportion of cultural workers who are Swiss nationals is higher in all regions.

Well qualified workforce

Cultural workers are a well-qualified section of the workforce: in 2019, the majority (56%) of the economically active persons held a tertiary qualification compared with 42% of the total workforce (see Graph G 5).

Cultural workers: educational attainment, compared with the overall economy, 2019 **G 5**



Source: FSO – Statistics on the cultural economy; SLFS © FSO 2020

Since 2010, the proportion of cultural workers holding a tertiary level qualification has increased by 9 percentage points. However, this mirrors a general trend in the workforce, where the proportion of highly-qualified workers increased by 10 percentage points over the same period.

Male cultural workers are more highly qualified than their female counterparts (60% versus 52% hold tertiary-level qualifications, respectively). However, this gap has narrowed slightly compared with 2010 (when the figures were 51% versus 41%). Non-Swiss cultural workers are much better qualified than Swiss ones: the proportion of people with a tertiary qualification is higher (66%) than among Swiss nationals (53%), and the proportion whose educational attainment is an upper secondary qualification is much lower (26% versus 40%).

Relatively few people switch careers

Do cultural workers normally practice the occupation in which they trained, or is it the norm for people to switch? In 2019, 46% of cultural workers were working in an occupation that was different to the field of their highest qualification. However, in the overall economy this figure is even higher (51%). The proportion of switchers is quite low in *Architecture* (26%), while in *Audio-visual and multimedia* it is much higher (64%).

Continuing education in the cultural sector

In 2019, 31% of cultural workers (here excluding apprentices) had attended a course, congress or seminar or taken private lessons in the four weeks preceding the survey. This is in line with the figure for the overall economy.

In 2019, continuing education was quite common in the domains of *Heritage* (35%) and *Cultural education* (38%), and less so in *Books and press* (23%). Female cultural workers are more likely to take continuing education courses than men (33% versus 24%). The most likely to take continuing education courses are 25- to 54-year-olds. The higher their educational attainment, the more likely people are to take continuing education and training courses: 35% of cultural workers with a tertiary qualification attended a continuing education course (lower and upper secondary level: 21% and 27%, respectively); in the economy as a whole this figure is 42%.

5 Working and living conditions in the cultural sector

This chapter looks at the working conditions and income of cultural workers, and how they subjectively assess their working and living conditions.

5.1 Working conditions

Moderate level of multiple employment

Most economically active cultural workers had only one professional activity in 2019 (86%), while 12% pursued two and 3% three activities. This result is less surprising when you consider that cultural workers in the broader sense were analysed here. This also includes people who work in the cultural sector but do not hold a cultural occupation – a population in which the often high-profile actors, musicians and writers only make up a minority – and, due to the survey methodology, excludes "part-time artists" with another main occupation. At 14%, multiple employment among cultural workers is much higher than in the economy as a whole (8%). Cultural workers working in the cultural sector are the most likely to exercise more than one professional activity (18%), while those with a non-cultural occupation in the cultural sector are the least likely (11%). In 2019, multiple employment was much more common in *Cultural education* (42%) and in *Performing arts* (21%) than in *Books and press* (9%), *Architecture* (9%) or in *Art crafts* (7%).

There is a slight trend towards multiple employment: in 2010, 12% of cultural workers performed more than one professional activity.

A certain stability – and many self-employed workers

The large majority of cultural workers (excluding apprentices) had a permanent contract (89%) in 2019, while only 9% were in temporary employment. The situation of cultural workers is similar to that of employees in the overall economy, where 91% have a permanent contract. Regarding employment status, 28% of the cultural workforce was self-employed in 2019.[1] This figure is significantly higher than in the overall economy, where 13% of the workforce is self-employed.

Male cultural workers are just as likely to have a permanent contract as their female counterparts, but are much more likely to be self-employed (32% versus 24% of women). Unsurprisingly, the most

1 Employees of their own company limited by shares (AG) or limited liability company (GmbH) are counted as self-employed.

self-employed cultural workers are found in *Performing arts* (37%), *Art crafts* (39%) but also – and to a much greater extent – in *Visual arts* (72%).

Long employment duration

In 2019, 16% of cultural workers (excluding apprentices) had been working in their job for under 12 months, 28% between 1 and 5 years, and the majority (56%) for over 5 years. The situation is slightly less stable in the overall economy, where 52% of workers have been working in the same organisation for over 5 years. If we consider cultural workers in the broader sense, we observe a certain stability.

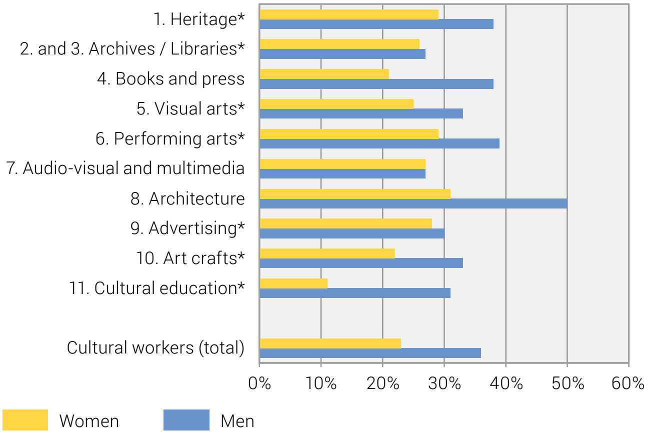
In 2019, cultural workers who had worked in their organisation for over 5 years were most likely to be in *Performing arts* (60%), *Visual arts* (66%), *Cultural education* (72%) and *Art crafts* (78%), and least likely to be in *Advertising* (42%). The average duration of employment of male cultural workers is slightly longer, with 59% of men versus 54% of women working in the same enterprise for over 5 years. There is also a difference here between Swiss and non-Swiss cultural workers (60% versus 41%).

Flatter or more informal hierarchies

Of economically active cultural workers (excluding apprentices) in 2019, 30% held an executive or managerial position in their enterprises, while 70% did not hold such a position. A look at the corresponding figures for the overall economy (33% versus 67%) suggests that cultural workers tend to work in flat and/or less formalised hierarchical structures – and often in small enterprises (see section 2.3).

There are major gender differences here: 36% of male cultural workers hold an executive or managerial position, compared with 24% of female ones. These differences are apparent in almost all cultural domains, but they are particularly marked in *Cultural education* (difference: 20 percentage points), *Architecture* (19) and in *Books and press* (17), while they are smaller in *Heritage* (9), *Visual arts* (8), *Advertising* (2), *Archives/Libraries* (1) and in *Audio-visual and multimedia* (no difference) (see Graph G6).

Cultural workers: executive or managerial function by sex, total and by cultural domain, pooling 2015–2019 G6



* Extrapolation on the basis of <160 observations; results should be interpreted with a great deal of caution.

Source: FSO – Statistics on the cultural economy; SLFS

Little inter-cantonal mobility

The vast majority (81%) of cultural workers worked in their canton of residence in 2019, virtually the same proportion as in 2010 (79%) and slightly more than in the economy as a whole in 2018 (77%).

Inter-cantonal mobility between the place of work and place of residence decreases among cultural workers in direct proportion to age, from 24% among 15- to 24-year-olds to 14% among 55- to 64- year-olds. In the overall economy, it is lowest among the youngest and oldest age groups, with the greatest inter-cantonal mobility observed among 25- to 39-year-olds (24%). Women working in the cultural sector are approximately as mobile (17%) as men (18%), unlike in the overall economy (women: 18%, men: 23%). The highest level of inter-cantonal mobility is observed in *Advertising* (39%), and the lowest in *Performing arts* and *Visual arts*, where 88% and 91% respectively work in their canton of residence.

5.2 Income

Marked differences in earnings

The median standardised[2] gross monthly salary in 2018 (the most recent year for which data are available) was CHF 6538 in the overall economy. In the cultural sector the median salary is slightly higher at CHF 6762; it is highest if we only consider cultural occupations in the cultural sector (CHF 7059) or else those who hold a cultural occupation outside of the cultural sector (CHF 6925). The median salary among all cultural workers in 2018 was CHF 6784. It should be noted that this refers to earnings in enterprises with three people or more and excludes self-employed people (see box on ESS). According to an exploratory analysis of pooled SLFS data from the period 2010–2019, the income of self-employed cultural workers tends to be lower than that of self-employed people in the overall economy.

ESS

The analysis of earned income[3] is based on the Swiss Earnings Structure Survey (ESS), which is conducted every year on a sample of 37 000 enterprises. The survey covers enterprises with three or more employees. There is no specific survey on earned income in small businesses and on the income of self-employed people. This gap should be closed in future using register data.

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[2] i.e. converted to a standardised working time of 4 $^1/_3$ weeks of 40 hours.

[3] Wage components: gross salary in October (including employee social insurance contributions, benefits in kind, regular bonuses, share of sales or commission), compensation for shift work, night-time work and Sunday work, $^1/_{12}$ of the 13th monthly salary and $^1/_{12}$ of the annual special payments. Family allowances and child allowances are not taken into account.

Differences can be observed, depending on the cultural domain.3 Cultural workers in the domains[4] of *Heritage and architecture* earned CHF 6949 and in *Other cultural domains* (advertising, art crafts and cultural education) CHF 6883, which was above the median for cultural workers, but those in *Performing and visual arts* earned less (CHF 6500). And there are regional differences: like in the overall economy, cultural workers in the Greater Zurich region earn slightly more, in other words CHF 620 more than the Swiss median for the cultural sector, while in Espace Mittelland workers earn CHF 590 less than the median, and in Northwestern Switzerland CHF 1560 less.

The familiar gender differences can also be seen here, but to a greater extent. While in the overall economy the median salary in 2018 was CHF 6857 for men and CHF 6067 for women, male cultural workers earned CHF 7356 and female cultural workers CHF 6088. This is 17% lower (compared with 12% lower in the overall economy). This gender gap, which may be associated with the lower educational attainment in women (see section 4.2), is particularly marked in *Books, press and multimedia* (–23% for women) and in *Heritage and architecture* (–17%).

Foreign cultural workers earn less than their Swiss colleagues (CHF 6316 versus CHF 6933), although the difference (–9%) is smaller than in the economy as a whole (–14%).

Lastly – as in the overall economy – the median salary in the cultural sector increases with age, but in a more marked fashion: in 2018 it increased from CHF 4588 for 15- to 24-year-old cultural workers (so slightly less than in the overall economy at CHF 4684), to CHF 7915 for 50- to 64-year-olds, which is slightly more than in the overall economy (CHF 7412). So from a somewhat modest starting point, wage progression for cultural workers (+73%) is higher than in the economy as a whole (+58%). This progression was greater in *Heritage and architecture* (+87%) and in *Other cultural domains* (advertising, art crafts and cultural education) (+78%), and more modest in *Books, press and multimedia* (+60%).

Slightly higher income in households with cultural workers

To gauge a person's financial situation, it is not only their salary that is important, but the total income of the household in which they live. Using the equivalised disposable income[5] from the SILC survey (see box), we can calculate peoples' living standard in households with at least one economically active cultural worker.

4 To increase the case numbers, these were grouped together again (see chapter 3).

5 i.e. gross household income minus compulsory expenditure (social insurance contributions, taxes or mandatory health insurance premiums and regular transfer payments, such as food) which is then weighted according to household members to take account of household size.

A total of 5.0% of the population lived in such a household in 2018. At around CHF 54 800, the median annual equivalised disposable income in these households is slightly higher than in all working households (CHF 52 800).

However, this result is strongly linked to the household type. Among cultural workers there is a higher proportion of childless households and more tertiary qualifications – in other words household types that tend to have higher incomes. The proportion of people who live in households in densely-populated areas is also much higher among cultural workers (41%) than among all working households (28%).

SILC

The Statistics on Income and Living Conditions (SILC) record information on the income and living conditions of some 7000 households (approximately 15 000 people) in Switzerland. The survey aims to analyse poverty, social exclusion and living conditions thanks to indicators that are comparable in over 30 European countries.

5.3 Subjective assessments of cultural workers

This section analyses how cultural workers assess their own working and living conditions, also based on the SILC survey.

Only limited satisfaction with financial situation

When it comes to satisfaction with their financial situation, there is virtually no difference between households with and without cultural workers. In 2018, the level of satisfaction with the household's finances was very similar among people in households with at least one person working in the cultural sector (53.6%) as among people in all other working households (54.2%). This may be due to the actual financial situation of these people as well as to their higher educational attainment, and possibly different values. However, at the level of individual cultural workers, the picture looks somewhat different: the proportion of people whose satisfaction with their *own* financial situation is "very high" is much lower among cultural workers (19.7%) than among the overall population (27.1%).

High level of satisfaction with life – with reservations

There are virtually no differences between cultural workers and the total population in terms of overall life satisfaction, satisfaction with personal relationships, and with working conditions and work environment. The relatively small SILC case numbers make it impossible to carry out a more detailed analysis by cultural domain or cultural occupation.

A number of differences can still be made out at this level though. For example, the proportion of people whose satisfaction with their living environment was “very high” was much lower among cultural workers (43.5%) than the overall population (51.3%) in 2018. Finally, and interestingly, a number of differences can be observed in the area of leisure. Here, too, the proportion of people who are very satisfied is lower among cultural workers than among the total population, both in terms of leisure activities (33.1% versus 40.1%) and – even more strikingly – in terms of time use (19.9% versus 31.5%). The latter results could be a sign of the difficulty drawing a clear distinction between work and private life, which is especially common in the cultural sector.

Annex: Methodology

Cultural domains and sectors (NACE/NOGA)

The 11 cultural domains were defined by Eurostat in 2012 and 2018 on the basis of 36 four-digit European NACE codes (Nomenclature statistique des Activités économiques), which at this level are compatible with the Swiss NOGA (General Classification of Economic Activities).

List: The cultural domains and their sectors (NOGA) according to Eurostat T6

1. Heritage	
9102	Museums
9103	Operation of historical sites and buildings, and similar visitor attractions
2 / 3. Archives/Libraries	
9101	Library and archives activities
4. Books and press	
1811	Publishing of newspapers
1812	Other publishing activities
1813	Pre-press and pre-media services
1814	Binding and related services
4761	Retail sale of books in specialised stores
4762	Retail sale of newspapers and stationery in specialised stores
5811	Publishing of books
5813	Publishing of newspapers
5814	Publishing of journals and periodicals
6391	Correspondents, news agencies
7430	Translation and interpretation activities
5. Visual arts	
7410	Specialised design activities
7420	Photographic activities
9003	Artistic creation

Source: NOGA 2008

List: The cultural domains and their sectors (NOGA) according to Eurostat (End) T 6

6. Performing arts	
3220	Manufacture of musical instruments
9001	Performing arts (theatre and ballet companies; orchestras, choirs, musicians)
9002	Support activities to performing arts
9004	Operation of arts facilities
7. Audio-visual and multimedia	
1820	Reproduction of recorded media
4763	Retail sale of music and video recordings in specialised stores
5821	Publishing of computer games
5911	Motion picture, video and television programme production activities
5912	Motion picture, video and television post-production activities
5913	Motion picture, video and television programme distribution activities
5914	Cinemas
5920	Sound recording and music publishing activities
6010	Radio broadcasting
6020	Television programming and broadcasting activities
7722	Renting of video tapes and disks
8. Architecture	
7111	Architects
9. Advertising	
7311	Advertising agencies
10. Art crafts	
3212	Manufacture of jewellery, gold and silversmith work
11. Cultural education	
8552	Cultural education

Source: NOGA 2008

Cultural occupations (according to ISCO)

The 35 four-digit occupation codes of the ISCO (International Standard Classification of Occupations) for cultural occupations were defined in 2012 and 2018 by Eurostat, partly to be consistent with UNESCO typologies.

List: The cultural occupations (ISCO) according to Eurostat T 7

2161	Building architects
2162	Landscape architects
2163	Product and garment designers
2164	Town and traffic planners
2165	Cartographers and surveyors
2166	Graphic and multimedia designers
2353	Language teachers
2354	Other music teachers
2355	Other arts teachers
2621	Archivists and curators
2622	Librarians and related information professionals
2641	Authors and related writers
2642	Journalists
2643	Translators, interpreters and other linguists
2651	Visual artist
2652	Musicians, singers and composers
2653	Dancers and choreographers
2654	Film, stage and related directors and producers
2655	Actors
2656	Announcers on radio, television and other media
2659	Creative and performing arts artists not elsewhere classified
3431	Photographers
3432	Interiors designers and decorators

Source: ISCO 2008

List: The cultural occupations (ISCO) according to Eurostat (End) T 7

3433	Gallery, museum and library technicians
3435	Other artistic and cultural associate professionals
3521	Broadcasting and audio-visual technicians
4411	Library clerks
7312	Musical instrument makers and tuners
7313	Jewelry and precious-metal workers
7314	Potters and related workers
7315	Glass makers, cutters, grinder and finishers
7316	Sign writers, decorative painters, engravers and etchers
7317	Handicraft workers in wood, basketry and related materials
7318	Handicraft workers in textile, leather and related materials
7319	Handicraft workers not elsewhere classified

Source: ISCO 2008

Spatial classification

Urban area: Urban cores comprise the core cities and the agglomeration core municipalities, as well as the core municipalities outside agglomerations. Urban cores meet certain density and size criteria regarding inhabitants, jobs and equivalent overnight stays.
Intermediate area (or dense peri-urban areas and rural centres): Intermediate areas are outlying areas and municipalities situated in commuting zones or oriented to multiple cores that fall under the influence of urban cores and exhibit a certain level of commuter flows with the urban core.
Rural area: Areas outside the influence of urban cores comprise the rural municipalities without urban character. These are characterised by small commuter flows towards the urban core.

Unemployment rate (ILO definition)

According to the International Labour Organization (ILO), unemployed persons are defined as all those of working age in the resident population who are without work, are seeking work, and are currently available for work.

Value added: international comparisons

When calculating the value added of the cultural economy, Eurostat includes the non-financial business economy of the cultural sector (so excluding NACE/NOGA codes 90 and 91), but without the two cultural domains *Advertising* and *Cultural education*.

Turner (2019) calculates the total cultural economy (including NACE/NOGA codes 90 and 91) and compares it with the overall economy (not only the business economy).

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FSO number
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