

# SWISS TOURISM IN FIGURES 2012

## STRUCTURE AND INDUSTRY DATA

PARTNERSHIP. POLITICS. QUALITY.



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# AT A GLANCE



Due to reference sources, figures either concern the year 2011 or 2012.

**EARNINGS AND EMPLOYMENT 2011**

|                                                             |                             |
|-------------------------------------------------------------|-----------------------------|
| Total revenue from Swiss tourism                            | 34.5 billion                |
| Revenue from tourist accommodation, meals or transportation | 18 billions                 |
| Tourism employment                                          | 144 745 full-time employees |

**EXPORT REVENUE 2012**

| Industry                                 | in billion CHF |
|------------------------------------------|----------------|
| 1. Chemical industry                     | 79.0           |
| 2. Metal and machine industry            | 59.4           |
| 3. Watchmaking industry                  | 21.4           |
| 4. Tourism (Tourism Balance of Payments) | 15.0           |

**TOURISM BALANCE OF PAYMENTS 2012**

| Revenue from foreign tourists in Switzerland                                      | in billion CHF |
|-----------------------------------------------------------------------------------|----------------|
| Tourism, including overnight stays                                                | 10.2           |
| Visitors staying in lodging facilities and with relatives                         | 7.3            |
| Educational & medical stays                                                       | 2.9            |
| Excursionists, transit visitors, other tourism                                    | 2.6            |
| Consumption expenditure of border workers incl. short-term residents (< 4 months) | 2.2            |
| <b>Total</b>                                                                      | <b>15.0</b>    |

Source: Swiss Federal Statistical Office

# LEGAL BASES

## NATIONAL TOURISM LAWS

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### **MARKETING SWITZERLAND AS A TOURIST DESTINATION**

Federal Act of 21 December 1955 on the Swiss National Tourist Office, from 1995 Switzerland Tourism (SR 935.21)

### **PROMOTION OF INNOVATION, COOPERATION AND KNOWLEDGE CREATION IN TOURISM**

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

### **PROMOTION OF THE HOTEL INDUSTRY**

Federal Act of 20 June 2003 on the Promotion of the Hotel Industry (SR 935.12)

### **REGIONAL POLICY**

Federal Act of 6 October 2006 on Regional Policy (SR 901.0)

### **CASINOS**

Federal Act of 18 December 1998 on Gambling and Gambling Casinos; (Gambling Act) (SR 935.52)

### **SPECIAL RATE FOR ACCOMMODATION SERVICES**

Federal Act of 12 June 2009 on Value Added Tax (VAT Act) (SR 641.20)

### **TOURISM STATISTICS**

Ordinance of 30 June 1993 on the Conduct of Federal Statistical Surveys (SR 431.012.1)

### **NATURE PARKS**

Federal Act of 1 July 1996 on the Protection of Nature and Cultural Heritage (SR 451)

### **CABLECARS AND CHAIRLIFTS**

Federal Act of 23 June 2006 on Cableways for Passenger Transport (Cableways Act) (SR 743.01)

Source: TERMDAT, terminology database of the Swiss Federal Administration

## CANTONAL TOURISM LAWS

| Canton                 | Internet                                     | Law                                                                                  |
|------------------------|----------------------------------------------|--------------------------------------------------------------------------------------|
| Aargau                 | <a href="http://www.ag.ch">www.ag.ch</a>     | Location Development Act of 1 January 2010                                           |
| Appenzell Innerrhoden  | <a href="http://www.ai.ch">www.ai.ch</a>     | Promotion of Tourism Act of 25 April 1999                                            |
| Appenzell Ausserrhoden | <a href="http://www.ar.ch">www.ar.ch</a>     | Tourism Act of 25 April 1976                                                         |
| Basel-Landschaft       | <a href="http://www.bl.ch">www.bl.ch</a>     | Tourism Act of 19 June 2003                                                          |
| Basel-Stadt            | <a href="http://www.bs.ch">www.bs.ch</a>     | Location Development Act of 29 June 2006                                             |
| Bern                   | <a href="http://www.be.ch">www.be.ch</a>     | Tourism Development Act of 20 June 2005                                              |
| Fribourg               | <a href="http://www.fr.ch">www.fr.ch</a>     | Tourism Act of 13 October 2005                                                       |
| Geneva                 | <a href="http://www.ge.ch">www.ge.ch</a>     | Tourism Act of 24 June 1993                                                          |
| Glarus                 | <a href="http://www.gl.ch">www.gl.ch</a>     | Tourism Development Act of 6 May 2007                                                |
| Graubünden             | <a href="http://www.gr.ch">www.gr.ch</a>     | Economic Development Act of 11 February 2004                                         |
| Jura                   | <a href="http://www.jura.ch">www.jura.ch</a> | Tourism Act of 31 May 1990                                                           |
| Lucerne                | <a href="http://www.lu.ch">www.lu.ch</a>     | Tourism Act of 30 January 1996                                                       |
| Neuchâtel              | <a href="http://www.ne.ch">www.ne.ch</a>     | Tourism Act of 25 June 1986                                                          |
| Nidwalden              | <a href="http://www.nw.ch">www.nw.ch</a>     | Tourism Act of 25 April 1971                                                         |
| Obwalden               | <a href="http://www.ow.ch">www.ow.ch</a>     | Tourism Act of 3 May 2012                                                            |
| St. Gallen             | <a href="http://www.sg.ch">www.sg.ch</a>     | Tourism Act of 26 November 1995                                                      |
| Schaffhausen           | <a href="http://www.sh.ch">www.sh.ch</a>     | Law on Contributions to the Cantonal Tourism Organisation of 16 June 2008            |
| Solothurn              | <a href="http://www.so.ch">www.so.ch</a>     | No tourism law                                                                       |
| Schwyz                 | <a href="http://www.sz.ch">www.sz.ch</a>     | Law on Economic Development of 27 November 1986                                      |
| Thurgau                | <a href="http://www.tg.ch">www.tg.ch</a>     | Law on Actions against Unemployment and for Location Development of 28 November 1988 |
| Ticino                 | <a href="http://www.ti.ch">www.ti.ch</a>     | Tourism Act of 30 November 1998                                                      |
| Uri                    | <a href="http://www.ur.ch">www.ur.ch</a>     | Tourism Promotion Act of 23 September 2012                                           |
| Vaud                   | <a href="http://www.vd.ch">www.vd.ch</a>     | Promotion of Tourism Act of 12 June 2007                                             |
| Valais                 | <a href="http://www.vs.ch">www.vs.ch</a>     | Tourism Act of 9 February 1996                                                       |
| Zug                    | <a href="http://www.zug.ch">www.zug.ch</a>   | Tourism Act of 27 March 2003                                                         |
| Zurich                 | <a href="http://www.zh.ch">www.zh.ch</a>     | No tourism law                                                                       |

# TOURIST REGIONS



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As of 2013

- |    |                                                                                                                                                                                                                                                                                                                          |
|----|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1  | <b>Graubünden:</b> Canton of Graubünden.                                                                                                                                                                                                                                                                                 |
| 2  | <b>Eastern Switzerland:</b> 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  | <b>Zurich Region:</b> 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  | <b>Lucerne / Lake Lucerne:</b> 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  | <b>Basel Region:</b> 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  | <b>Bern Region:</b> 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  | <b>Bernese Oberland:</b> Canton of Bern: districts of Frutigen-Niedersimmental, Interlaken-Oberhasli, Obersimmental-Saanen, part of the district of Thun.                                                                                                                                                                |
| 8  | <b>Jura &amp; Three-Lakes:</b> 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  | <b>Lake Geneva Region (Vaud):</b> Canton of Vaud.                                                                                                                                                                                                                                                                        |
| 10 | <b>Geneva:</b> Canton of Geneva.                                                                                                                                                                                                                                                                                         |
| 11 | <b>Valais:</b> Canton of Valais.                                                                                                                                                                                                                                                                                         |
| 12 | <b>Ticino:</b> Canton of Ticino.                                                                                                                                                                                                                                                                                         |
| 13 | <b>Fribourg Region:</b> Canton of Fribourg.                                                                                                                                                                                                                                                                              |

# TOURISM – AN IMPORTANT SECTOR OF THE ECONOMY

Domestic and international tourism are important factors in the Swiss economy. Of a total revenue of CHF 34.5 billion in 2011, 18 billion or almost 52 % came from tourist accommodation, meals or transportation. These three tourism products are responsible for 59 % 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. Approximately 5.5 % of Switzerland’s export revenue come from tourism.<sup>1</sup>

## EXPORT REVENUE

| Industry <sup>2</sup>                    | 2012 | 2011 | 2010<br>in billion CHF | 2009 | 2008 |
|------------------------------------------|------|------|------------------------|------|------|
| 1. Chemical industry                     | 79.0 | 74.6 | 75.9                   | 71.8 | 71.9 |
| 2. Metal and machine industry            | 59.4 | 64.0 | 63.6                   | 58.1 | 74.0 |
| 3. Watchmaking industry                  | 21.4 | 19.3 | 16.2                   | 13.2 | 17.0 |
| 4. Tourism (Tourism Balance of Payments) | 15.0 | 15.2 | 15.4                   | 15.4 | 15.6 |
| 5. Textile industry                      | 3.1  | 3.2  | 3.4                    | 3.7  | 4.5  |

<sup>1</sup> The 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.

<sup>2</sup> Excluding labour and property income from abroad

Source: Swiss Federal Statistical Office

## 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 the footnote 1 on the previous page regarding this point.

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 |                   |             |
|-----------------------------------------------------------------------------------|-------------------------------|-------------------|-------------------|--------------------------------------|-------------------|-------------|
|                                                                                   | 2012 <sup>2</sup>             | 2011 <sup>1</sup> | 2010 <sup>1</sup> | 2012 <sup>2</sup>                    | 2011 <sup>1</sup> | 2010        |
| Tourism, including overnight stays                                                | 10.2                          | 10.4              | 10.5              | 9.8                                  | 9.2               | 8.9         |
| Visitors staying in lodging facilities and with relatives                         | 7.3                           | 7.7               | 7.9               |                                      |                   |             |
| Educational & medical stays                                                       | 2.9                           | 2.8               | 2.6               |                                      |                   |             |
| Excursionists, transit visitors, other tourism                                    | 2.6                           | 2.7               | 2.9               | 3.1                                  | 2.9               | 2.7         |
| Consumption expenditure of border workers incl. short-term residents (< 4 months) | 2.2                           | 2.1               | 1.9               |                                      |                   |             |
| <b>Total</b>                                                                      | <b>15.0</b>                   | <b>15.2</b>       | <b>15.4</b>       | <b>12.9</b>                          | <b>12.1</b>       | <b>11.6</b> |

<sup>1</sup> Revised figures

<sup>2</sup> Provisional figures

Source: Swiss Federal Statistical Office

## **THE SATELLITE ACCOUNT: CAPTURING THE ECONOMIC IMPORTANCE OF TOURISM**

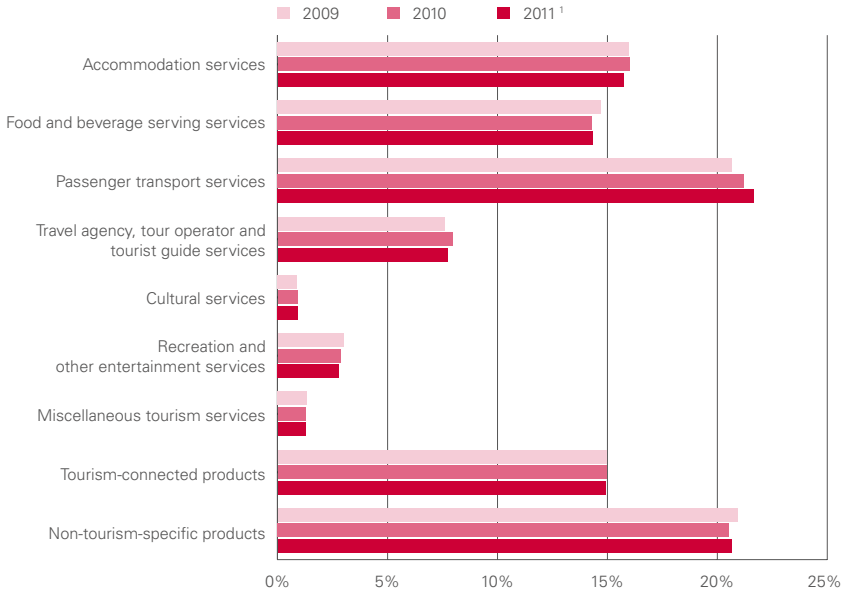
The main challenge in capturing economic statistics of tourism is the fact that economic statistics are generally supply-side oriented. The NOGA division into different industries is based on the goods and services they mainly produce. By contrast, tourism as a cross-sectional sector includes several 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 TSA represents the basic synthesising statistic to measure these economic impacts of tourism.

A Satellite Account was compiled for 2001, 2005 and most recently for 2008. The TSA indicators are calculated for the interim years. Their aim is to publish initial estimates for the Tourism Satellite Account's main aggregates in a timely and simplified way. The results of the Tourism Satellite Account 2008 are part of the complex system of monetary tourism statistics and provide important information on the structure of the tourism sector in Switzerland. This structural information is then used to revise the TSA indicators. Since the last Tourism Satellite Account in 2005, there has been no new information related to the structure of the tourism sector. Especially those shares of tourism, i.e. the share of demand, added value and employment directly attributable to tourism, can be adapted to the economic reality thanks to the newly available information for the year 2008.

## SHARE OF INDIVIDUAL TOURISM PRODUCTS IN TOTAL TOURIST DEMAND

After the growth of all aggregates in 2010, the tourism sector posted a less positive year in 2011. Despite a decline in demand for tourist accommodation (–1.5%), demand for characteristic tourism products showed a light growth (+0.3%). In addition to the growing demand for meals in restaurants and hotels (+0.6%), this was due to additional demand for tourism products in passenger traffic (+2.5%) and culture (+1.3%).

### SHARES OF THE TOURISM INDUSTRY IN SWITZERLAND



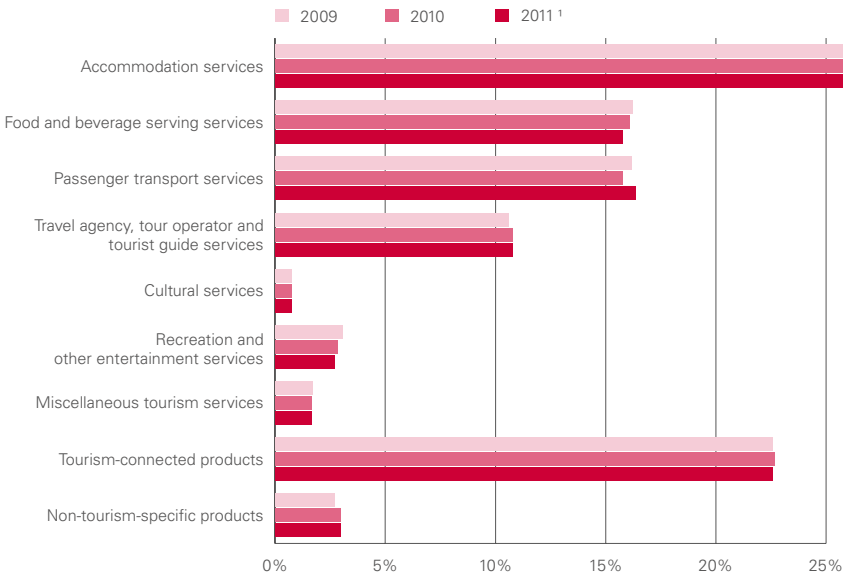
<sup>1</sup> First estimate

Source: Annual indicators of the Tourism Satellite Account, Swiss Federal Statistical Office

**ACCOMMODATION SERVICES:  
HIGHEST SHARE OF TOURIST VALUE ADDED**

Between 2009 and 2011, tourism gross value added as a proportion of total gross value added decreased slightly at 2.7%. The development of shares of accommodation, meals in restaurants and hotels and passenger traffic reflects the demand situation. Due to the increase in demand, total value added also increased by 0.5 % in 2011. The additional value added in the tourism industry in 2011 was mainly driven by accommodation (+0.6%) and passenger traffic (+4.0%).

**SHARE OF TOURISM GROSS VALUE ADDED ACCORDING TO PRODUCTS**

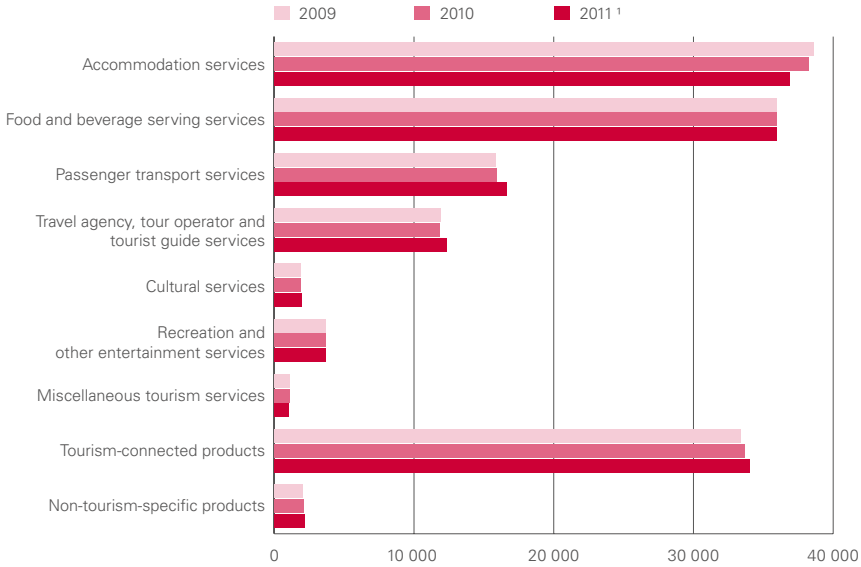


<sup>1</sup> First estimate  
Source: Annual indicators of the Tourism Satellite Account, Swiss Federal Statistical Office

## INCREASED TOURISM EMPLOYMENT AND PRODUCTIVITY

After tourism employment fell by 0.1 % in 2010, it rose slightly in 2011 by 0.3 %. In 2011, tourism employment was equal to 144 745 full-time equivalent jobs. Whereas tourism employment in accommodation was declining at –3.5 %, passenger transport showed strong growth of +4.7 %. If the slower growth of tourism employment in 2011 is considered together with the stronger growth of tourism’s gross value added, the tourism sector records a slight increase in productivity.

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



<sup>1</sup> First estimate

Source: Annual indicators of the Tourism Satellite Account, Swiss Federal Statistical Office

**FULL-TIME EQUIVALENTS ACCORDING TO ECONOMIC SECTORS**

(IN 1000, ANNUAL AVERAGE)

|                                            |       | 2012   | 2011   | 2010    | 2009    | 2008    | 2007    |
|--------------------------------------------|-------|--------|--------|---------|---------|---------|---------|
| Service industry                           | Total | 2501.1 | 2447.1 | 2 413.1 | 2 390.5 | 2 379.9 | 2312.9  |
|                                            | Men   | 1349.0 | 1323.7 | 1 305.0 | 1 294.2 | 1 295.9 | 1 268.3 |
|                                            | Women | 1152.1 | 1123.3 | 1 108.1 | 1 096.3 | 1 084.0 | 1 044.6 |
| Accommodation                              | Total | 62.6   | 64.5   | 67.3    | 66.9    | 67.9    | 65.8    |
|                                            | Men   | 29.9   | 30.8   | 31.8    | 31.0    | 31.0    | 29.7    |
|                                            | Women | 32.8   | 33.7   | 35.5    | 36.0    | 36.9    | 36.1    |
| Food and beverage service activities       | Total | 106.4  | 109.7  | 113.4   | 114.1   | 118.2   | 115.5   |
|                                            | Men   | 54.3   | 55.8   | 57.5    | 56.9    | 57.8    | 55.8    |
|                                            | Women | 52.1   | 53.9   | 56.0    | 57.2    | 60.4    | 59.7    |
| Land transport and transport via pipelines | Total | 94.6   | 91.8   | 90.2    | 89.3    | 89.7    | 87.4    |
|                                            | Men   | 82.0   | 79.9   | 78.4    | 78.0    | 78.5    | 77.2    |
|                                            | Women | 12.5   | 11.9   | 11.7    | 11.3    | 11.2    | 10.3    |
| Water transport and air transport          | Total | 12.7   | 11.8   | 10.6    | 10.8    | 11.1    | 10.0    |
|                                            | Men   | 7.8    | 7.2    | 6.4     | 6.4     | 6.5     | 6.1     |
|                                            | Women | 4.8    | 4.6    | 4.2     | 4.4     | 4.6     | 3.9     |

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

|                                | 2012<br>4th quarter | 2012<br>3th quarter | 2012<br>2th quarter | 2012<br>1st quarter | 2011<br>4th quarter |
|--------------------------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| Full-time jobs (90 % and over) | 136.8               | 136.9               | 138.7               | 139.4               | 140.9               |
| Men                            | 76.4                | 75.0                | 75.8                | 77.6                | 78.3                |
| Women                          | 60.4                | 61.9                | 63.0                | 61.8                | 62.6                |
| Part-time jobs I (50–89 %)     | 38.8                | 39.7                | 39.2                | 36.2                | 36.8                |
| Part-time jobs II (< 50 %)     | 34.1                | 34.2                | 34.2                | 34.2                | 33.6                |
| Total number of jobs (overall) | 209.8               | 210.8               | 212.2               | 209.9               | 211.3               |
| Men                            | 94.8                | 93.6                | 94.2                | 95.2                | 95.3                |
| Women                          | 114.9               | 117.2               | 118.0               | 114.7               | 115.9               |

Source: Employment statistic, Swiss Federal Statistical Office

# TRAVEL BEHAVIOUR OF THE SWISS RESIDENTIAL POPULATION



In 2011, 85.1 % of the Swiss population undertook trips with at least one overnight stay abroad. A total of 16.2 million trips were made, of which 5.8 million were within Switzerland. On average 2.5 trips were made per person, of which 0.9 trips had a domestic destination.

While women and men make about the same number of trips, a comparison between different age groups and language regions shows differences in travel behaviour. Whereas people aged 25 to 44 were the most frequent travellers, taking three trips per year, people aged 65 or over took an average of 1.8 trips with overnight stays. In addition, the Swiss-German population travelled considerably more frequently (2.7 trips per year) than that of French- and Italian-speaking Switzerland (2.2 and 1.5 trips per year respectively).

NUMBER OF TRIPS (IN 1000)

|                            | 2011   | 2010   | 2009   | 2008   |
|----------------------------|--------|--------|--------|--------|
| Trips with overnight stays | 16 245 | 16 595 | 17 183 | 20 069 |
| Day trips                  | 63 823 | 67 904 | 75 451 | 78 654 |

In addition to trips with overnight stays, data on day trips were also collected. The Swiss resident population undertook a total of 63.8 million day trips in 2011, corresponding to an average of 9.9 trips per person. For day trips with a domestic destination, a decline of 11 % was recorded in comparison with the previous year: this is equal to 1.1 fewer trips per person.

NUMBER OF TRIPS (PER PERSON)

|                            | 2011 | 2010 | 2009 | 2008 |
|----------------------------|------|------|------|------|
| Trips with overnight stays | 2.5  | 2.6  | 2.7  | 3.2  |
| Day trips                  | 9.9  | 10.7 | 12.0 | 12.7 |

<sup>1</sup> Swiss resident population aged 15 or over: 6 426 470 persons  
Source: Survey of travel behaviour 2011, Swiss Federal Statistical Office

### DURATION AND PURPOSE OF TRAVEL

Trips with a destination abroad lasted longer than trips within Switzerland. Some 71 % of trips abroad were trips of 4 or more overnight stays. In Switzerland, on the other hand, the majority of trips (62 %) were composed of 1 to 3 overnight stays. As in the previous year, holidays and recreation were the main reasons for trips with overnight stays. They accounted for 71 % of trips, and a good two-thirds of these had a foreign destination. In second place came trips for the purpose of visiting family and friends (16 %). Business trips accounted for 5 % of trips.

### TRAVEL DESTINATIONS

In 2011, 5.8 million trips with overnight stays had a domestic destination, and 10.5 million had a foreign destination. The number of trips with overnight stays in Switzerland declined by 12 % compared with the previous year, but nevertheless approximately 36 % of all trips were made in Switzerland. The most common destinations abroad were Italy (12 %), Germany (11 %), France (10 %) and Austria (5 %). Among these, only trips to France showed an increase compared to 2010 (+28 %).

### NUMBER OF TRIPS WITH OVERNIGHT STAYS ACCORDING TO DESTINATIONS (IN 1000)

|                               | 2011          | 2010          | 2009          | 2008          |
|-------------------------------|---------------|---------------|---------------|---------------|
| Switzerland                   | 5 779         | 6 584         | 6 730         | 8 922         |
| Germany                       | 1 722         | 1 911         | 2 011         | 2 776         |
| Austria                       | 839           | 763           | 942           | 825           |
| Italy                         | 1 905         | 2 060         | 1 738         | 1 691         |
| France <sup>1</sup>           | 1 625         | 1 267         | 1 764         | 1 870         |
| Southeast Europe <sup>2</sup> | 837           | 864           | 801           | 688           |
| Southwest Europe <sup>3</sup> | 911           | 860           | 721           | 890           |
| Rest of Europe                | 1 361         | 1 000         | 1 239         | 1 123         |
| Rest of the world             | 1 261         | 1 280         | 1 217         | 1 268         |
| Unknown                       | 4             | 7             | 20            | 16            |
| <b>Total</b>                  | <b>16 245</b> | <b>16 595</b> | <b>17 183</b> | <b>20 069</b> |

<sup>1</sup> Including overseas departments and Monaco

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

<sup>3</sup> Spain, Portugal, Andorra, Gibraltar

Source: Survey of travel behaviour 2011, Swiss Federal Statistical Office

# 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 2012, the Swiss hotel industry recorded a total of 34.8 million overnight stays which was 2 % less than in the previous year. Swiss demand amounted to 15.7 million overnight stays, which corresponds to a fall of 0.4 % compared with 2011. Foreign guests generated 19.1 million overnight stays, i.e. a decrease of 3.3 %. Germany accounted for the strongest foreign demand with 4.6 million overnight stays (–11 % compared with 2011), followed by the United Kingdom with 1.5 million (–9.1 %) and the United States with also 1.5 million (+2.2 %) overnight stays. In terms of tourist regions, the Zurich region recorded the highest number of overnight stays in 2012 with 5.3 million units (+1.8 %). It was followed by Graubünden with 5.1 million overnight stays (–5.6 %) and Valais with 4.0 million overnight stays (–2.2 %). In 2012, visitors stayed an average of 2.1 nights in hotels and health establishments 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**  
CHANGE IN 2012 IN PER CENT COMPARED TO THE SAME PERIOD OF 2011

|             | Total | Foreigners | Swiss |
|-------------|-------|------------|-------|
| January     | –4.2  | –8.3       | 0.8   |
| February    | 2.2   | –2.9       | 8.2   |
| March       | –8.0  | –12.3      | –2.2  |
| April       | –4.9  | –3.2       | –7.0  |
| May         | 0.7   | –1.3       | 3.6   |
| June        | –5.4  | –5.5       | –5.2  |
| July        | –6.9  | –8.8       | –4.3  |
| August      | 0.2   | –0.6       | 1.2   |
| September   | –1.2  | –1.0       | –1.5  |
| October     | 1.7   | 5.8        | –2.1  |
| November    | 1.6   | 2.3        | 0.8   |
| December    | 5.3   | 5.5        | 5.1   |
| Entire year | –2.0  | –3.3       | –0.4  |

Source: Swiss Federal Statistical Office

**OVERNIGHT STAYS BY COUNTRY OF RESIDENCE OF VISITORS** (IN MILLIONS, ROUNDED VALUES)

| Country of residence of visitors        | Calendar year 2012 | Winter season 11/12 | Summer season 2012 |
|-----------------------------------------|--------------------|---------------------|--------------------|
| <b>Total</b>                            | <b>34.8</b>        | <b>15.3</b>         | <b>19.3</b>        |
| Switzerland                             | 15.7               | 7.1                 | 8.5                |
| Foreign countries                       | 19.1               | 8.2                 | 10.8               |
| <b>Europe total (excl. Switzerland)</b> | <b>13.0</b>        | <b>6.2</b>          | <b>6.8</b>         |
| Germany                                 | 4.6                | 2.1                 | 2.5                |
| United Kingdom <sup>1</sup>             | 1.5                | 0.8                 | 0.8                |
| France                                  | 1.3                | 0.7                 | 0.6                |
| Italy                                   | 1.0                | 0.5                 | 0.5                |
| Netherlands                             | 0.7                | 0.3                 | 0.4                |
| Belgium                                 | 0.6                | 0.3                 | 0.3                |
| Nordic countries <sup>2</sup>           | 0.5                | 0.3                 | 0.2                |
| Russia                                  | 0.6                | 0.3                 | 0.2                |
| Spain                                   | 0.4                | 0.2                 | 0.3                |
| Austria                                 | 0.4                | 0.2                 | 0.2                |
| Other countries Europe                  | 1.3                | 0.6                 | 0.7                |
| <b>America total</b>                    | <b>2.2</b>         | <b>0.8</b>          | <b>1.4</b>         |
| United States                           | 1.5                | 0.5                 | 1.0                |
| Canada                                  | 0.2                | 0.1                 | 0.1                |
| Brazil                                  | 0.2                | 0.1                 | 0.1                |
| Other countries America                 | 0.2                | 0.1                 | 0.1                |
| <b>Asia total</b>                       | <b>3.3</b>         | <b>1.0</b>          | <b>2.3</b>         |
| Japan                                   | 0.5                | 0.1                 | 0.4                |
| China (incl. Hong Kong)                 | 0.8                | 0.3                 | 0.6                |
| Republic of Korea                       | 0.2                | 0.1                 | 0.1                |
| Israel                                  | 0.2                | 0.1                 | 0.1                |
| India                                   | 0.5                | 0.1                 | 0.4                |
| Other countries Asia                    | 1.1                | 0.4                 | 0.7                |
| <b>Africa total</b>                     | <b>0.3</b>         | <b>0.1</b>          | <b>0.2</b>         |
| <b>Australia, Oceania total</b>         | <b>0.3</b>         | <b>0.1</b>          | <b>0.2</b>         |

<sup>1</sup> Great Britain and Northern Ireland<sup>2</sup> Denmark, Finland, Norway, Sweden, Iceland

Source: Swiss Federal Statistical Office

**HOTEL INDUSTRY: SUPPLY AND DEMAND  
CANTONS**

| Canton                 | Capacity <sup>1</sup> |                | Overnight stays in millions |             |             | Net occupancy rate in % |                   |
|------------------------|-----------------------|----------------|-----------------------------|-------------|-------------|-------------------------|-------------------|
|                        | Rooms                 | Beds           | Swiss                       | Foreigners  | Total       | Rooms <sup>2</sup>      | Beds <sup>3</sup> |
| Graubünden             | 18 957                | 39 190         | 2.9                         | 2.2         | 5.1         | 49.0                    | 40.3              |
| Bern                   | 17 019                | 33 161         | 2.2                         | 2.5         | 4.7         | 50.0                    | 41.8              |
| Zurich                 | 13 958                | 24 012         | 1.2                         | 3.3         | 4.6         | 64.8                    | 52.4              |
| Valais                 | 14 109                | 29 134         | 1.0                         | 1.5         | 4.0         | 48.7                    | 41.4              |
| Geneva                 | 9 029                 | 14 823         | 0.5                         | 2.3         | 2.8         | 63.6                    | 52.0              |
| Vaud                   | 9 146                 | 17 326         | 2.1                         | 1.8         | 2.5         | 51.4                    | 40.2              |
| Ticino                 | 8 566                 | 16 880         | 0.3                         | 0.2         | 2.3         | 45.6                    | 38.6              |
| Lucerne                | 6 021                 | 11 365         | 0.7                         | 1.1         | 1.8         | 52.9                    | 43.5              |
| Basel-Stadt            | 3 843                 | 6 555          | 0.3                         | 0.8         | 1.1         | 59.8                    | 45.4              |
| St. Gallen             | 5 049                 | 9 802          | 0.6                         | 0.5         | 1.0         | 38.4                    | 30.3              |
| Aargau                 | 3 273                 | 5 406          | 0.4                         | 0.3         | 0.7         | 45.1                    | 35.7              |
| Schwyz                 | 2 308                 | 4 475          | 0.4                         | 0.2         | 0.6         | 40.9                    | 37.5              |
| Obwalden               | 2 312                 | 4 580          | 0.3                         | 0.3         | 0.6         | 43.7                    | 36.7              |
| Fribourg               | 2 143                 | 4 315          | 0.3                         | 0.2         | 0.5         | 39.1                    | 30.0              |
| Thurgau                | 2 091                 | 3 673          | 1.3                         | 1.0         | 0.4         | 40.5                    | 31.6              |
| Solothurn              | 1 615                 | 2 816          | 0.2                         | 0.2         | 0.4         | 45.1                    | 36.1              |
| Zug                    | 1 184                 | 1 874          | 0.1                         | 0.2         | 0.3         | 54.3                    | 42.9              |
| Basel-Landschaft       | 1 367                 | 2 533          | 0.1                         | 0.1         | 0.3         | 40.7                    | 29.6              |
| Neuchâtel              | 1 265                 | 2 460          | 0.1                         | 0.1         | 0.2         | 37.2                    | 26.9              |
| Uri                    | 1 287                 | 2 663          | 0.1                         | 0.1         | 0.2         | 33.4                    | 25.8              |
| Nidwalden              | 824                   | 1 769          | 0.1                         | 0.1         | 0.2         | 43.3                    | 33.4              |
| Appenzell Innerrhoden  | 615                   | 1 962          | 0.1                         | 0.0         | 0.2         | 44.9                    | 25.8              |
| Schaffhausen           | 625                   | 1 211          | 0.1                         | 0.1         | 0.1         | 41.2                    | 30.6              |
| Appenzell Ausserrhoden | 879                   | 1 571          | 0.1                         | 0.0         | 0.1         | 29.5                    | 23.1              |
| Glarus                 | 738                   | 1 616          | 0.1                         | 0.0         | 0.1         | 29.3                    | 23.1              |
| Jura                   | 873                   | 1 779          | 0.1                         | 0.0         | 0.1         | 23.1                    | 17.5              |
| <b>Total</b>           | <b>129 097</b>        | <b>246 951</b> | <b>15.7</b>                 | <b>19.1</b> | <b>34.8</b> | <b>50.5</b>             | <b>40.8</b>       |

<sup>1</sup> Only open establishments (available rooms and beds)<sup>2</sup> Number of room nights in per cent of the net room capacity<sup>3</sup> Number of overnight stays in per cent of the net bed capacity<sup>4</sup> Top 14 destinations based on overnight stays in 2012

Source: Swiss Federal Statistical Office

## TOURIST REGIONS

| Tourist regions           | Capacity <sup>1</sup> |                | Overnight stays in millions |             |             | Net occupancy rate in % |                   |
|---------------------------|-----------------------|----------------|-----------------------------|-------------|-------------|-------------------------|-------------------|
|                           | Rooms                 | Beds           | Swiss                       | Foreigners  | Total       | Rooms <sup>2</sup>      | Beds <sup>3</sup> |
| Zurich Region             | 17 288                | 29 500         | 1.6                         | 3.7         | 5.3         | 61.7                    | 49.8              |
| Graubünden                | 18 957                | 39 190         | 2.9                         | 2.2         | 5.1         | 49.0                    | 40.3              |
| Valais                    | 14 109                | 29 134         | 2.1                         | 1.8         | 4.0         | 48.7                    | 41.4              |
| Bernese Oberland          | 11 835                | 23 755         | 1.6                         | 1.9         | 3.5         | 51.0                    | 43.8              |
| Lucerne/Lake Lucerne      | 12 549                | 24 533         | 1.4                         | 1.9         | 3.3         | 46.4                    | 38.6              |
| Geneva                    | 9 029                 | 14 823         | 0.5                         | 2.3         | 2.8         | 63.6                    | 52.0              |
| Lake Geneva Region (Vaud) | 9 146                 | 17 326         | 1.0                         | 1.5         | 2.5         | 51.4                    | 40.2              |
| Ticino                    | 8 566                 | 16 880         | 1.3                         | 1.0         | 2.3         | 45.6                    | 38.6              |
| Eastern Switzerland       | 9 750                 | 19 374         | 1.2                         | 0.7         | 1.9         | 37.8                    | 28.9              |
| Basel Region              | 5 855                 | 10 202         | 0.5                         | 0.9         | 1.5         | 52.7                    | 39.5              |
| Bern Region               | 5 761                 | 10 152         | 0.7                         | 0.7         | 1.4         | 50.2                    | 39.5              |
| Jura & Three-Lakes        | 4 108                 | 7 767          | 0.4                         | 0.3         | 0.7         | 36.4                    | 27.1              |
| Fribourg Region           | 2 143                 | 4 315          | 0.3                         | 0.2         | 0.5         | 39.1                    | 30.0              |
| <b>Total</b>              | <b>129 097</b>        | <b>246 951</b> | <b>15.7</b>                 | <b>19.1</b> | <b>34.8</b> | <b>50.5</b>             | <b>40.8</b>       |

## TOP DESTINATIONS

| Destinations <sup>4</sup> | Capacity <sup>1</sup> |                | Overnight stays in millions |             |             | Net occupancy rate in % |                   |
|---------------------------|-----------------------|----------------|-----------------------------|-------------|-------------|-------------------------|-------------------|
|                           | Rooms                 | Beds           | Swiss                       | Foreigners  | Total       | Rooms <sup>2</sup>      | Beds <sup>3</sup> |
| Zurich                    | 7 846                 | 13 585         | 0.6                         | 2.2         | 2.8         | 68.8                    | 55.5              |
| Geneva                    | 6 198                 | 10 108         | 0.3                         | 1.7         | 2.0         | 64.1                    | 53.2              |
| Zermatt                   | 3 204                 | 6 291          | 0.6                         | 0.7         | 1.3         | 66.9                    | 60.3              |
| Lucerne                   | 2 971                 | 5 628          | 0.3                         | 0.8         | 1.1         | 66.8                    | 56.0              |
| Basel                     | 3 744                 | 6 371          | 0.3                         | 0.8         | 1.1         | 60.7                    | 46.1              |
| Davos                     | 2 889                 | 5 552          | 0.4                         | 0.4         | 0.8         | 52.3                    | 45.1              |
| Lausanne                  | 2 142                 | 3 816          | 0.2                         | 0.5         | 0.7         | 65.7                    | 50.9              |
| St. Moritz                | 2 225                 | 4 227          | 0.2                         | 0.5         | 0.7         | 60.8                    | 52.3              |
| Bern                      | 2 104                 | 3 627          | 0.3                         | 0.4         | 0.7         | 63.4                    | 52.0              |
| Interlaken                | 1 593                 | 3 056          | 0.2                         | 0.5         | 0.7         | 66.0                    | 60.5              |
| Lugano                    | 1 599                 | 3 015          | 0.2                         | 0.3         | 0.5         | 55.2                    | 46.5              |
| Opfikon                   | 1 420                 | 2 478          | 0.1                         | 0.4         | 0.5         | 69.1                    | 55.3              |
| Grindelwald               | 1 328                 | 2 802          | 0.2                         | 0.3         | 0.5         | 60.0                    | 51.1              |
| Lauterbrunnen             | 1 344                 | 2 687          | 0.1                         | 0.3         | 0.4         | 58.2                    | 52.3              |
| <b>Switzerland</b>        | <b>129 097</b>        | <b>246 951</b> | <b>15.7</b>                 | <b>19.1</b> | <b>34.8</b> | <b>50.5</b>             | <b>40.8</b>       |

**SUPPLY IN HOTELS AND HEALTH ESTABLISHMENTS**

| Year | Surveyed establishments | Surveyed rooms | Surveyed beds | Open establishments | Available rooms | Available beds |
|------|-------------------------|----------------|---------------|---------------------|-----------------|----------------|
| 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        |
| 2008 | 5 582                   | 141 680        | 270 487       | 4 924               | 127 923         | 241 345        |

**STAR RATING SYSTEM IN HOTELS AND HEALTH ESTABLISHMENTS**

| Category       | Open establishments | Available rooms | Available beds | Net occupancy rate in % (rooms) <sup>1</sup> | Net occupancy rate in % (beds) <sup>2</sup> | RevPAR <sup>3</sup> |
|----------------|---------------------|-----------------|----------------|----------------------------------------------|---------------------------------------------|---------------------|
| 1 star         | 36                  | 1 393           | 3 106          | 60.4                                         | 45.8                                        | 81.4                |
| 2 stars        | 236                 | 6 774           | 13 000         | 56.6                                         | 45.3                                        | 67.0                |
| 3 stars        | 887                 | 31 524          | 58 292         | 56.0                                         | 46.5                                        | 83.0                |
| 4 stars        | 425                 | 30 808          | 54 474         | 60.2                                         | 50.9                                        | 124.3               |
| 5 stars        | 83                  | 9 534           | 16 711         | 55.7                                         | 47.1                                        | 282.0               |
| No information | 2 793               | 43 049          | 87 972         | 37.2                                         | 29.0                                        | 40.2                |
| No category    | 283                 | 6 016           | 13 396         | 47.5                                         | 37.5                                        | 65.6                |
| <b>Total</b>   | <b>4 742</b>        | <b>129 097</b>  | <b>246 951</b> | <b>50.5</b>                                  | <b>40.8</b>                                 | <b>92.1</b>         |

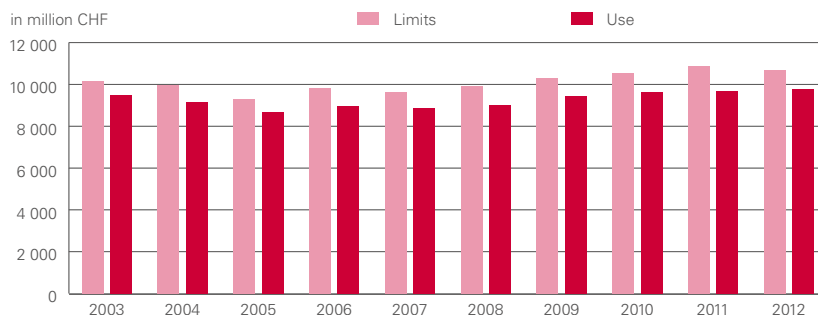
**SIZE OF HOTELS AND HEALTH ESTABLISHMENTS**

| Size of establishment | Open establishments | Cumulative | in % | Cumulative |
|-----------------------|---------------------|------------|------|------------|
| 0 to 10 beds          | 731                 | 731        | 15.4 | 15.4       |
| 11 to 20 beds         | 1 034               | 1 765      | 21.8 | 37.2       |
| 21 to 50 beds         | 1 595               | 3 360      | 33.6 | 70.8       |
| 51 to 100 beds        | 867                 | 4 227      | 18.3 | 89.1       |
| 101 to 150 beds       | 260                 | 4 487      | 5.5  | 94.6       |
| 151 to 200 beds       | 111                 | 4 597      | 2.3  | 96.9       |
| 201 to 300 beds       | 82                  | 4 679      | 1.7  | 98.7       |
| 301 and more beds     | 63                  | 4 742      | 1.3  | 100.0      |

<sup>1</sup> Number of room nights in per cent of the net room capacity<sup>2</sup> Number of overnight stays in per cent of the net bed capacity<sup>3</sup> RevPAR = revenue/(available rooms \* open days); verified by hotelleriesuisse

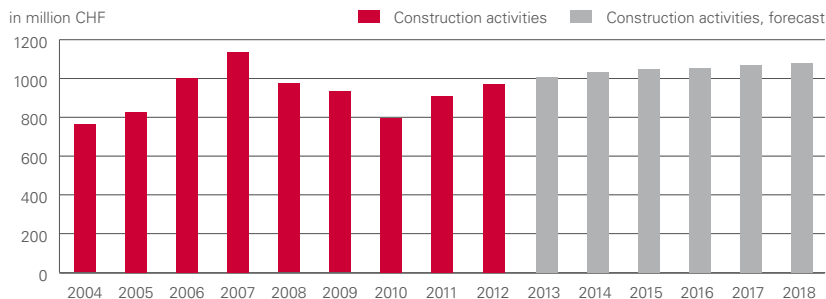
The 2011 triggered growth resulting from investment in hotel constructions continued in 2012 despite the difficult economic environment and strong Swiss franc. With investments in the region of 971 million francs, development in the construction of hotels and restaurants rose by 6.9% as compared to the previous year. Positive aspects such as the attractiveness of the Alpine areas and favourable financing options seemed to outweigh the pressure of margins and problem of a lack of guests. An uncertainty factor is the pending legislation on the implementation of a second home initiative. In the coming years however, investments could increase, amounting to figures in the region of CHF 1 billion by the year 2018.

#### STATISTICS OF TOTAL LOANS IN THE HOSPITALITY SERVICE INDUSTRY



Source: Swiss National Bank, Monthly Bulletins of Banking Statistics

#### DEVELOPMENT OF CONSTRUCTION ACTIVITIES IN THE HOTEL AND RESTAURANT SECTOR



Source: BAKBASEL, Hochbauprognose 2012–2018

## FACTS AND FIGURES FROM PROFESSIONAL DISCUSSION FORUMS (2011)

For almost 70 years hotelleriesuisse has been organising and coordinating the exchange of information between its members through professional discussion forums. The results of the discussion forums of hotelleriesuisse (approximately 160 operations) cannot claim to be representative or complete. However, they provide valuable information from a group of leading and larger operations regarding developments and changes during the fiscal year. All figures are averages.

### HOTEL BENCHMARK 2011

| Hotel category (in %)<br>Number of hotels         | 3 stars<br>46 | 4 stars<br>75 | 5 stars<br>24 |
|---------------------------------------------------|---------------|---------------|---------------|
| Income from accommodation                         | 54.6          | 51.4          | 53.2          |
| Income from restaurants                           | 40.7          | 40.3          | 36.2          |
| Other income                                      | 4.7           | 8.3           | 10.6          |
| <b>Total income</b>                               | <b>100.0</b>  | <b>100.0</b>  | <b>100.0</b>  |
| <b>Gross operating income (GOI) accommodation</b> | <b>56.2</b>   | <b>60.2</b>   | <b>67.4</b>   |
| <b>Gross operating income (GOI) restaurants</b>   | <b>5.5</b>    | <b>12.0</b>   | <b>2.8</b>    |
| Direct cost of goods                              | 14.4          | 14.0          | 12.2          |
| Direct staff costs                                | 37.1          | 37.1          | 37.7          |
| Direct operating expenses                         | 6.8           | 6.5           | 7.8           |
| <b>Gross operating income (GOI)</b>               | <b>41.7</b>   | <b>42.4</b>   | <b>42.4</b>   |
| Administrative expenses (including staff costs)   | 8.4           | 8.4           | 8.6           |
| Marketing expenses (including staff costs)        | 2.4           | 3.6           | 5.1           |
| Maintenance costs (including staff costs)         | 5.4           | 6.4           | 7.6           |
| Energy costs (including staff costs)              | 2.4           | 3.2           | 3.1           |
| Other expenses                                    | 0.3           | 0.7           | 0.1           |
| <b>Gross operating profit (GOP)</b>               | <b>22.7</b>   | <b>20.0</b>   | <b>17.8</b>   |

### Key figures

|                                |           |           |            |
|--------------------------------|-----------|-----------|------------|
| Number of rooms                | 45.4      | 81.3      | 139.0      |
| Average room occupancy         | 1.46      | 1.56      | 1.57       |
| Average stay in days           | 2.42      | 2.72      | 3.06       |
| Revenue per room in CHF        | 35 374    | 49 108    | 100 382    |
| Return on food sales in %      | 61.6      | 66.4      | 68.5       |
| Return on beverages sales in % | 69.4      | 72.2      | 74.1       |
| F & B return in %              | 61.9      | 69.0      | 70.3       |
| Total sales in CHF             | 3 406 974 | 8 133 475 | 26 709 654 |

Source: hotelleriesuisse

**ROOM AVERAGE (IN CHF)**

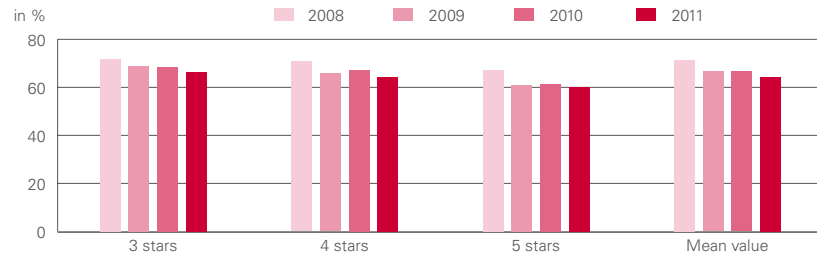
The room average indicates the average revenue per room.

| Hotel category | 3 stars | 4 stars | 5 stars | Mean value |
|----------------|---------|---------|---------|------------|
| 2011           | 161.77  | 234.70  | 546.20  | 263.12     |
| 2010           | 162.15  | 231.20  | 533.40  | 260.76     |
| 2009           | 156.55  | 232.40  | 550.90  | 261.80     |
| 2008           | 156.80  | 233.70  | 554.75  | 275.30     |

Source: hotelleriesuisse

**OCCUPANCY RATE**

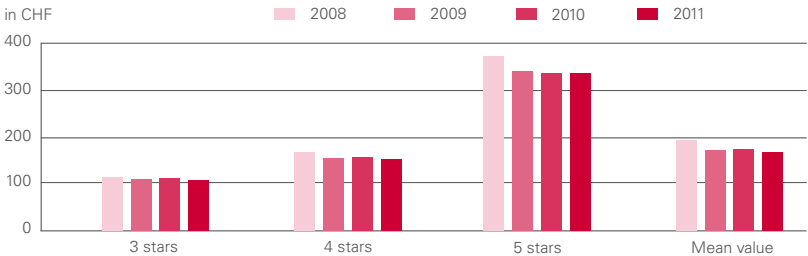
Occupancy rate based on available days indicates how often a room was occupied on the days on which it was available.



Source: hotelleriesuisse

**REVPAR**

Revenue per available room is a meaningful ratio in terms of value added of available rooms.



Source: hotelleriesuisse

More information is provided in the publication ‘Yearbook of the Swiss Hotel Industry’, available from hotelleriesuisse, P.O. Box, 3001 Bern.

# SUPPLEMENTARY ACCOMMODATION <sup>1</sup>

## HOLIDAY APARTMENTS



NUMBER OF PERMANENTLY AND PART-TIME OCCUPIED APARTMENTS

|             | Apartments total | Permanently occupied | Occupied part-time | Unoccupied |
|-------------|------------------|----------------------|--------------------|------------|
| Switzerland | 3 569 181        | 3 027 829            | 419 819            | 121 533    |

Source: Swiss Federal Statistical Office, Census 2000

ANALYSES OF SUPPLEMENTARY ACCOMMODATION ‘PASTA LIGHT’

The precise number of touristic second homes in Switzerland is currently not known. The following analyses are based on reports and information regarding residential units used for tourism, which were collected by municipalities, tourism offices, STF classification offices and reservation systems. The reported figures therefore do not reflect the total non-hotel overnight stays in Switzerland.

One third of all reported destinations have no record of overnight stays or the number of holiday apartments – around half declare the number of overnight stays for each calendar year and approximately a sixth of all destination reports the amount of overnight stays for the tourism year (summer and winter season). The total amount of overnight stays in Swiss holiday apartments is estimated in the region of 18 million (basis: last census FSO 2003). Average duration of occupancy of the apartments is 61 days.

OVERNIGHT STAYS HOLIDAY APARTMENTS

|               | Apartments | Overnight stays |
|---------------|------------|-----------------|
| Calendar year | 54 292     | 5 453 030       |

|                          | Apartments | Overnight stays |
|--------------------------|------------|-----------------|
| Tourism year 2011 / 2012 | 4 727      | 1 105 734       |

GUESTS' COUNTRY OF ORIGIN

|                             | in % |
|-----------------------------|------|
| Switzerland                 | 66,0 |
| Germany                     | 13,5 |
| Netherlands                 | 5,0  |
| Great Britain               | 3,0  |
| France                      | 2,5  |
| Belgium                     | 2,0  |
| Russia (Russian Federation) | 1,0  |
| Italy                       | 1,0  |
| Other Europe                | 2,5  |
| Rest of the world           | 3,5  |

| Rest of the world – in detail | in % |
|-------------------------------|------|
| United States                 | 20,5 |
| Israel                        | 14,5 |
| India                         | 12,0 |
| Saudi Arabia                  | 12,0 |
| Kuwait                        | 5,5  |
| Japan                         | 5,5  |
| Australia                     | 4,0  |
| United Arab Emirates          | 3,5  |
| Canada                        | 3,5  |
| Other countries               | 19,0 |

<sup>1</sup> Non-hotel accommodation  
Source: Swiss Tourism Federation

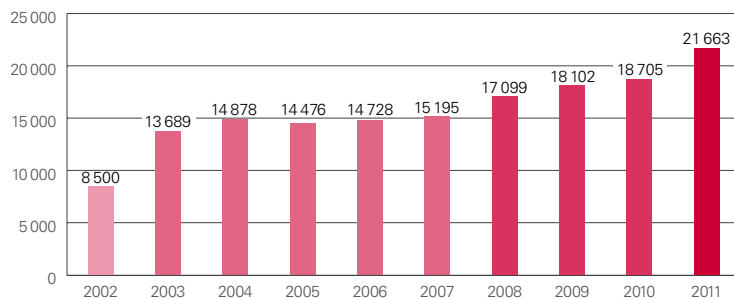
## CLASSIFIED HOLIDAY APARTMENTS & GUEST ROOMS

### HOLIDAY APARTMENTS BY REGIONS

| Tourist region                    |  ***** |  **** |  *** |  ** |  * |  |  |  |  |  | Total                     |
|-----------------------------------|-----------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|---------------------------|
| Basel Region                      | 0                                                                                       | 0                                                                                      | 0                                                                                     | 1                                                                                    | 0                                                                                   | 0                                                                                 | 0                                                                                 | 0                                                                                 | 0                                                                                  | 0                                                                                   | 1                         |
| Bern Region                       | 1                                                                                       | 0                                                                                      | 0                                                                                     | 6                                                                                    | 1                                                                                   | 23                                                                                | 1                                                                                 | 11                                                                                | 0                                                                                  | 2                                                                                   | 45                        |
| Bernese Oberland                  | 0                                                                                       | 29                                                                                     | 8                                                                                     | 344                                                                                  | 92                                                                                  | 1 276                                                                             | 177                                                                               | 210                                                                               | 45                                                                                 | 0                                                                                   | 2 181                     |
| Fribourg Region                   | 0                                                                                       | 0                                                                                      | 0                                                                                     | 10                                                                                   | 5                                                                                   | 44                                                                                | 4                                                                                 | 16                                                                                | 1                                                                                  | 0                                                                                   | 80                        |
| Geneva                            | 0                                                                                       | 0                                                                                      | 0                                                                                     | 5                                                                                    | 0                                                                                   | 1                                                                                 | 0                                                                                 | 0                                                                                 | 0                                                                                  | 0                                                                                   | 6                         |
| Lake Geneva Region                | 0                                                                                       | 22                                                                                     | 5                                                                                     | 97                                                                                   | 26                                                                                  | 195                                                                               | 18                                                                                | 66                                                                                | 3                                                                                  | 2                                                                                   | 434                       |
| Graubünden                        | 1                                                                                       | 77                                                                                     | 27                                                                                    | 658                                                                                  | 240                                                                                 | 2 712                                                                             | 307                                                                               | 424                                                                               | 43                                                                                 | 12                                                                                  | 4 501                     |
| Jura & Three-Lakes                | 0                                                                                       | 1                                                                                      | 3                                                                                     | 15                                                                                   | 36                                                                                  | 158                                                                               | 46                                                                                | 48                                                                                | 9                                                                                  | 1                                                                                   | 317                       |
| Lucerne/Lake Lucerne              | 0                                                                                       | 8                                                                                      | 1                                                                                     | 69                                                                                   | 22                                                                                  | 541                                                                               | 65                                                                                | 107                                                                               | 12                                                                                 | 2                                                                                   | 827                       |
| Eastern Switzerland/Liechtenstein | 0                                                                                       | 0                                                                                      | 2                                                                                     | 97                                                                                   | 14                                                                                  | 271                                                                               | 41                                                                                | 50                                                                                | 16                                                                                 | 1                                                                                   | 492                       |
| Ticino                            | 5                                                                                       | 13                                                                                     | 9                                                                                     | 137                                                                                  | 37                                                                                  | 721                                                                               | 59                                                                                | 106                                                                               | 21                                                                                 | 7                                                                                   | 1 115                     |
| Valais                            | 7                                                                                       | 278                                                                                    | 29                                                                                    | 1 437                                                                                | 350                                                                                 | 4 535                                                                             | 306                                                                               | 911                                                                               | 69                                                                                 | 28                                                                                  | 7 950                     |
| Zurich Region                     | 0                                                                                       | 0                                                                                      | 0                                                                                     | 7                                                                                    | 1                                                                                   | 66                                                                                | 0                                                                                 | 4                                                                                 | 0                                                                                  | 0                                                                                   | 78                        |
| <b>Total</b>                      | <b>14</b>                                                                               | <b>428</b>                                                                             | <b>84</b>                                                                             | <b>2 883</b>                                                                         | <b>824</b>                                                                          | <b>10 543</b>                                                                     | <b>1 024</b>                                                                      | <b>1 953</b>                                                                      | <b>219</b>                                                                         | <b>55</b>                                                                           | <b>18 027<sup>1</sup></b> |

<sup>1</sup> Of these, 169 objects are guest rooms.

### AWARDED CERTIFICATES 2002–2011



For more information on the classification of holiday apartments and guest rooms, please go to page 54 of this brochure.  
Source: Swiss Tourism Federation

GROUP LODGINGS

In 2012 CONTACT groups.ch transmitted 2 182 953 overnight stays (–4.1 %) to 671 affiliated group accommodations (–1.22 %) in Switzerland. Swiss guests were responsible for 1 715 232 overnight stays. The strongest foreign demand came from Germany with 270 117 overnight stays (–9.4 %). Stays decreased in summer by 7.5 % and in winter by 2.8 %.

Fortunately, the size of the groups remained high with an average of 30 people. The average length of stay has increased even slightly from 4.7 to 4.8 nights (+2.1 %). The highest average of stay was recorded by Graubünden with 5.7 nights. It is followed by the Valais region with 5.5 nights. In comparison, groups stay for a much shorter period in urban areas. For example in the Basel region the average was 4.2 nights.

In 2012 the Valais region recorded the highest number of overnight stays with 438 474 units (–2.9 %) in 156 accommodations (–3.8 %), followed by Graubünden with 425 870 (–6.7 %) in 127 houses (unchanged) and the Bernese Oberland with 320 904 units (–9.4 %) in 118 group accommodations (–4.2 %). A year ago, Graubünden ranked just before the Valais.

SUPPLY AND DEMAND

| Tourist Region                    | Establish-ments | Beds   | Groups | Arrivals | Overnight stays | Duration of stay | Group size |
|-----------------------------------|-----------------|--------|--------|----------|-----------------|------------------|------------|
| Basel Region                      | 4               | 300    | 59     | 1 560    | 6 377           | 4.2              | 27         |
| Bern Region                       | 14              | 952    | 310    | 7 685    | 28 558          | 3.8              | 26         |
| Bernese Oberland                  | 118             | 7 972  | 2 598  | 68 011   | 320 904         | 4.9              | 28         |
| Fribourg Region                   | 19              | 1301   | 660    | 23 487   | 91 986          | 4                | 38         |
| Lake Geneva Region (Vaud)         | 36              | 2 533  | 1 036  | 31 563   | 118 469         | 4.1              | 33         |
| Graubünden                        | 127             | 8 762  | 2 614  | 75 675   | 425 870         | 5.7              | 32         |
| Jura & Three-Lakes                | 43              | 2 518  | 1 383  | 41 468   | 161 888         | 4                | 31         |
| Lucerne/Lake Lucerne              | 68              | 4 233  | 1 848  | 57 452   | 252 628         | 4.5              | 33         |
| Eastern Switzerland/Liechtenstein | 55              | 3 643  | 1 756  | 48 542   | 218 012         | 4.6              | 30         |
| Ticino                            | 22              | 836    | 884    | 18 946   | 91 429          | 4.9              | 22         |
| Valais                            | 156             | 10 451 | 3 115  | 84 444   | 438 474         | 5.5              | 30         |
| Zurich Region                     | 9               | 585    | 274    | 7 741    | 28 359          | 3.7              | 29         |
| Total                             | 671             | 44 086 | 16 540 | 466 574  | 2 182 953       | 4.8              | 30         |

Source: CONTACT groups.ch

## YOUTH HOSTELS

In 2012, youth hostels based in Switzerland recorded a total of 917 000 overnight stays or 1.3 % less than during the previous year. Domestic demand was at 537 000 overnight stays, which corresponds to an increase of 1.4 %. Foreign demand generated 380 000 overnight stays or 1.2 % more. German guests accounted for the largest share of foreign demand with 102 000 overnight stays (–21 % compared with 2011), followed by guests from France with 28 000 overnight stays (+12 %) and from the United Kingdom with 27 000 overnight stays (+14 %). In terms of tourist regions, Graubünden recorded the largest number of overnight stays with 143 000 units (–3.6 % compared with 2011), followed by Zurich region with 120 000 overnight stays (+8.5 %) and Ticino with 96 000 overnight stays (–5.7 %). In 2012, the average duration of stay in the youth hostels was 2 nights at national level. This number applies to both Swiss citizens and foreign guests. In terms of tourist regions, the largest length of stay was registered in Graubünden with a result of 2.7 nights.

### SUPPLY AND DEMAND

| Tourist Region            | Surveyed establishments | Surveyed beds | Arrivals       | Overnight stays | Average duration of stay |
|---------------------------|-------------------------|---------------|----------------|-----------------|--------------------------|
| Graubünden                | 8                       | 1 030         | 52 825         | 142 801         | 2.7                      |
| Eastern Switzerland       | 6                       | 524           | 28 989         | 48 368          | 1.7                      |
| Zurich Region             | 7                       | 735           | 63 271         | 119 856         | 1.9                      |
| Lucerne/Lake Lucerne      | 6                       | 552           | 40 740         | 73 335          | 1.8                      |
| Basel Region              | 3                       | 398           | x              | x               | x                        |
| Bern Region               | 4                       | 332           | 30 739         | 49 859          | 1.6                      |
| Bernese Oberland          | 5                       | 546           | 38 173         | 74 395          | 1.9                      |
| Jura & Three-Lakes        | 3                       | 266           | x              | x               | x                        |
| Lake Geneva Region (Vaud) | 4                       | 550           | 41 437         | 88 411          | 2.1                      |
| Geneva                    | 1                       | 334           | x              | x               | x                        |
| Valais                    | 3                       | 341           | 24 916         | 50 071          | 2.0                      |
| Ticino                    | 4                       | 596           | 46 682         | 95 917          | 2.1                      |
| Fribourg Region           | 1                       | 76            | x              | x               | x                        |
| <b>Total</b>              | <b>55</b>               | <b>6 280</b>  | <b>459 121</b> | <b>916 685</b>  | <b>2.0</b>               |

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

Source: Swiss Federal Statistical Office

## CAMPSITES<sup>1</sup>

In 2012, the campsites recorded 3 million overnight stays representing a decrease of 3.0 % compared with the previous year. Swiss guests accounted for 1.8 million overnight stays, up 3.2 %. Foreign guests generated 1.2 million overnight stays, down 11 %. German guests accounted for 456 000 overnight stays (–7.9 % compared with 2011), which corresponds to the highest absolute result among the foreign countries. They were followed by visitors from the Netherlands with 328 000 overnight stays (–21 %), France with 84 000 overnight stays (–3,8 %) and the United Kingdom with 64 000 (–26 %). With a total of 774 000 overnight stays for 2012, Ticino saw a 5.3 % decrease compared with the previous year, ranking first among all tourist regions in terms of absolute overnight stays. It was followed by Valais with 411 000 overnight stays (–8.5 %). For Switzerland as a whole the average length of stay was 3.2 nights in 2012. Swiss guests spent an average of 3.5 nights on campsites while for foreign guests the number was 2.9 nights. Of all tourist regions Ticino recorded the longest average length of stay with 4.2 nights.

### SUPPLY AND DEMAND

| Tourist region                                    | Surveyed establishments | Total campsites | Overnight leased campsites | Permanently leased campsites | Arrivals       | Overnight stays  | Average duration of stay |
|---------------------------------------------------|-------------------------|-----------------|----------------------------|------------------------------|----------------|------------------|--------------------------|
| Graubünden                                        | 45                      | 5 240           | 3 615                      | 1 625                        | 81 561         | 263 529          | 3.2                      |
| Eastern Switzerland                               | 39                      | 4 853           | 1 764                      | 3 089                        | 64 373         | 157 791          | 2.5                      |
| Zurich Region                                     | 28                      | 3 382           | 1 395                      | 1 986                        | 49 577         | 126 085          | 2.5                      |
| Lucerne/Lake Lucerne                              | 40                      | 5 472           | 2 578                      | 2 894                        | 108 184        | 253 219          | 2.3                      |
| Basel Region                                      | 10                      | 802             | 252                        | 550                          | 10 432         | 25 550           | 2.4                      |
| Bern Region                                       | 10                      | 1 234           | 865                        | 370                          | 26 464         | 63 479           | 2.4                      |
| Bernese Oberland                                  | 54                      | 5 146           | 3 288                      | 1 857                        | 100 512        | 313 234          | 3.1                      |
| Jura & Three-Lakes                                | 37                      | 5 860           | 2 704                      | 3 156                        | 61 468         | 202 281          | 3.3                      |
| Lake Geneva Region (Vaud) and Geneva <sup>2</sup> | 46                      | 7 979           | 3 540                      | 4 440                        | 87 022         | 317 481          | 3.6                      |
| Valais                                            | 65                      | 8 016           | 6 217                      | 1 799                        | 116 651        | 411 358          | 3.5                      |
| Ticino                                            | 35                      | 6 061           | 5 076                      | 984                          | 186 174        | 773 609          | 4.2                      |
| Fribourg Region                                   | 14                      | 2 703           | 708                        | 1 995                        | 24 492         | 56 840           | 2.3                      |
| <b>Total</b>                                      | <b>423</b>              | <b>56 747</b>   | <b>32 002</b>              | <b>24 746</b>                | <b>916 910</b> | <b>2 964 456</b> | <b>3.2</b>               |

<sup>1</sup> 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](http://www.tourismus.bfs.admin.ch) (in German or French)

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

Source: Swiss Federal Statistical Office

## AGRITOURISM & BED AND BREAKFAST

### AGRITOURISM

With approximately 260 000 overnight stays<sup>1</sup> 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 600 providers).

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

| Tourist region <sup>2</sup>      | Overnight stays<br>'Swiss Holiday Farms' | Overnight stays<br>'Sleep in Straw!' | Total 2012     |
|----------------------------------|------------------------------------------|--------------------------------------|----------------|
| Graubünden                       | 4 790                                    | 2 636                                | 7 426          |
| Eastern Switzerland              | 21 204                                   | 5 335                                | 26 539         |
| Zurich Region                    | 5 731                                    | 2 350                                | 8 081          |
| Basel Region                     | 2 684                                    | 3 102                                | 5 786          |
| Central Switzerland              | 23 565                                   | 8 806                                | 32 371         |
| Schweizer Mittelland             | 25 338                                   | 3 583                                | 28 921         |
| Western Switzerland <sup>3</sup> | 4 931                                    | 6 639                                | 11 570         |
| Bernese Oberland                 | 2 886                                    | 2 391                                | 5 277          |
| Ticino                           | 2 175                                    | 465                                  | 2 640          |
| Valais                           | 0                                        | 1 056                                | 1 056          |
| <b>Total</b>                     | <b>93 304</b>                            | <b>36 363</b>                        | <b>129 667</b> |
| Number of establishments         | 178                                      | 163                                  | 341            |

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

<sup>2</sup> Old FSO definition of regions

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

Source: Agritourism Switzerland, 'Swiss Holiday Farms', 'Sleep in Straw!'

### BED AND BREAKFAST

|      | Number of<br>establishments <sup>4</sup> | Rooms | Beds  | Arrivals | Overnight stays<br>Swiss | Overnight stays<br>foreigners | Overnight<br>stays total |
|------|------------------------------------------|-------|-------|----------|--------------------------|-------------------------------|--------------------------|
| 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                  |
| 2010 | 933                                      | 2 717 | 5 602 | 157 060  | 168 711                  | 200 151                       | 368 862                  |
| 2009 | 867                                      | 2 592 | 5 385 | 147 511  | 155 680                  | 199 877                       | 355 557                  |

<sup>4</sup> 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

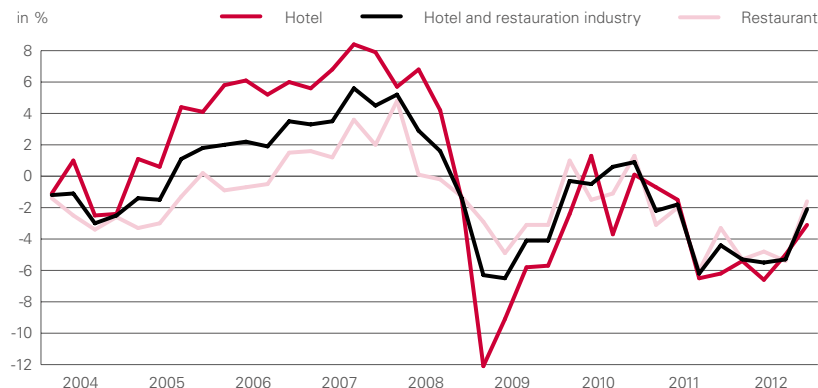
## MAJOR EMPLOYER IN SWITZERLAND

|         |                                                                                      |
|---------|--------------------------------------------------------------------------------------|
| 214 807 | employees (2012)                                                                     |
| 9 514   | trainees in basic vocational education and training (2011)                           |
| 28 600  | hotel and restaurant establishments (2008)                                           |
| 28.7    | billion francs of VAT-taxable annual turnover in catering business and hotels (2011) |
| 955     | million francs paid in VAT (after pre-tax deduction) (2011)                          |
|         | or                                                                                   |
| 9.3     | % of the overall net Federal Tax Administration (FTA) receivables (2011)             |

Switzerland’s hotel and restaurant industry, with its 214 807 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 9 514 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 (2008) counts some 28 600 hotel and restaurant establishments in Switzerland. Of these, 68 % are restaurants, 16 % hotels, 8 % bars, pubs, night clubs or discos and 2.6 % pure catering companies. The hotel and catering industry generated a VAT-taxable annual turnover of around CHF 28.7 billion. The hotel and restaurant industry makes a substantial contribution to VAT revenues. In 2011, it paid the net sum of CHF 955 million in VAT. The approximately 26 836 restaurants and hotels in 2011 liable for tax thus contributed 9.3 % of the overall Federal Tax Administration (FTA) volume of CHF 10.2 billion.

Source: GastroSuisse, Industry Report 2013

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

|             |        |             |        |
|-------------|--------|-------------|--------|
| 1st quarter | -5.3 % | 3rd quarter | -5.3 % |
| 2nd quarter | -5.5 % | 4th quarter | -2.1 % |

Source: GastroSuisse

For the hotel and restaurant industry, 2012 was another difficult year with a huge decline in turnover. It was not until the fourth quarter that the situation improved slightly. However, turnover figures remained below those of the previous year.

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

|             |        |             |        |
|-------------|--------|-------------|--------|
| 1st quarter | -5.3 % | 3rd quarter | -5.4 % |
| 2nd quarter | -4.8 % | 4th quarter | -1.6 % |

Source: GastroSuisse

Restaurants also suffered a noticeable decline in turnover. In the first quarter, medium-sized establishments were particularly affected by the decline in turnover. However, the decline in the demand for drinks was greater than that for food. For the first half of 2013 too, restaurants anticipate a difficult business situation and fear further reductions in the workforce.

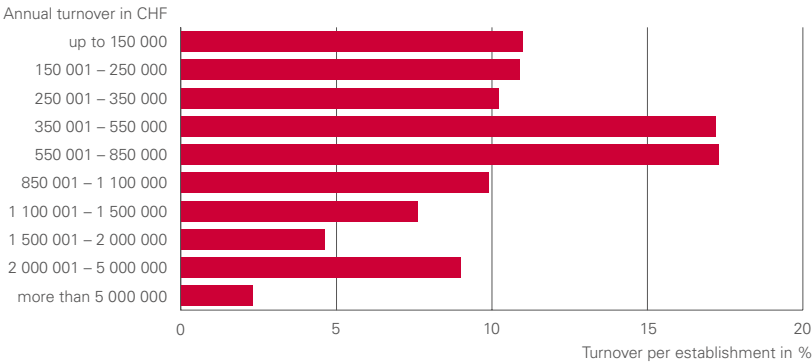
**ACCOMMODATION:  
CHANGE IN SALES COMPARED TO THE PRIOR YEAR QUARTER**

|             |        |             |        |
|-------------|--------|-------------|--------|
| 1st quarter | -5.4 % | 3rd quarter | -5.0 % |
| 2nd quarter | -6.6 % | 4th quarter | -3.1 % |

Source: GastroSuisse

Overall, there was a considerable decline in reservations and overnight stays. In the first two quarters, three-star hotels sustained the heaviest losses; they recovered slightly in the third quarter. However, establishments with one or two stars and those with five came increasingly under pressure from the middle of the year onwards. Based on the twelve months overall, four-star hotels performed best but they too suffered a noticeable fall in turnover.

**TURNOVER PER ESTABLISHMENT**



Source: GastroSuisse, Industry Report 2013

With a good 17 % each, the turnover categories between 350 001 and 850 000 francs account for most establishments. A third of establishments had turnover of under 350 000 francs a year, whilst 33 % generated more than 850 000 francs. Compared to last year, there has been an increasing trend for establishments with higher turnover. Nevertheless, the percentages decline as the turnover category increases. It is impressive that 9 % of companies in the hotel and restaurant industry generate turnover of between 2 and 5 million francs per year.

**AN OVERVIEW OF IMPORTANT KEY RATIOS FOR THE HOTEL AND RESTAURANT INDUSTRY 2011**

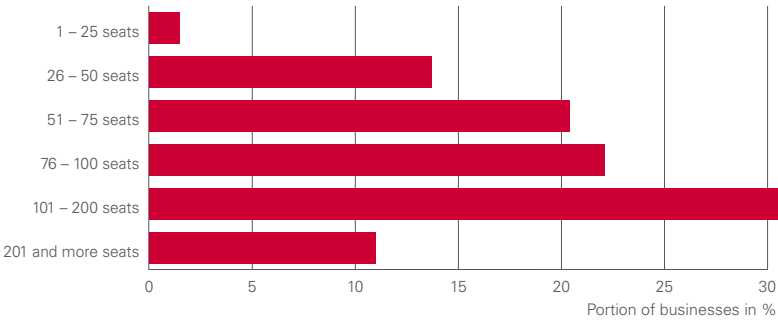
|                                                           |             |
|-----------------------------------------------------------|-------------|
| Total turnover per operating day                          | 2 111 CHF   |
| Total turnover per employee                               | 106 411 CHF |
| Total turnover per employee and operating day             | 376 CHF     |
| Turnover per restaurant per seat                          | 8 415 CHF   |
| Turnover per restaurant per seat and operating day        | 30 CHF      |
| Turnover from food preparation per seat                   | 5 310 CHF   |
| Turnover from food preparation per seat and operating day | 19 CHF      |

Source: GastroSuisse, Industry Report 2013

In restaurants, the turnover generated per person employed was on average CHF 106 411; and in hotels with a restaurant the corresponding amount was only slightly higher at CHF 106 593. Total turnover per operating day in restaurants was on average CHF 2 111, and in hotels with a restaurant CHF 3 318. Turnover per seat in a restaurant totalled CHF 8 415 or CHF 19 per day of operation.

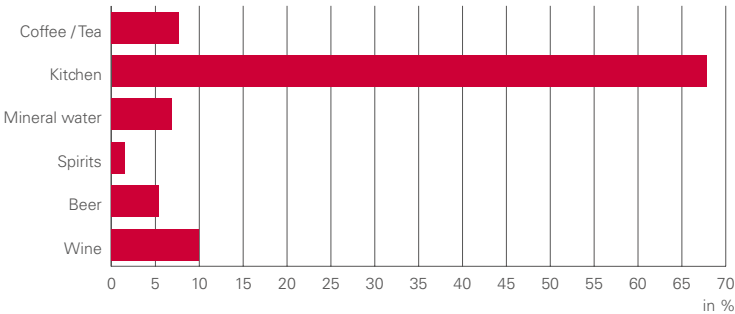
For more information, check the publication from GastroSuisse ‘Branchenspiegel 2013’ (‘Industry Report 2013’), available from GastroSuisse (phone: 0848 377 111) for CHF 35.

**BUSINESS SIZE:  
NUMBER OF SEATS PER RESTAURANT**



**TURNOVER MIX**

In 2011, over two thirds of turnover in the restaurants came from products from the kitchen and 17% from alcoholic beverages. Coffee/tea and mineral water made up 7.7% and 6.9% of the turnover respectively. In comparison to the previous year the turnover share produced by the kitchen has increased further (+3.8 percent points), at the expense of beverages. Wine and mineral water in particular achieved lower turnover (–1.4 and –0.9 percent points respectively).



Source: GastroSuisse, Industry Report 2013

# OUTGOING

## MOST POPULAR TRAVEL DESTINATIONS OF THE SWISS POPULATION

| EUROPE        | Incoming travellers from Switzerland |           |          | Overnight stays        |                        |          |                  |
|---------------|--------------------------------------|-----------|----------|------------------------|------------------------|----------|------------------|
|               | 2011                                 | 2010      | +/- in % | 2011                   | 2010                   | +/- in % | Ø nights         |
| France        | 5 700 000                            | 5 500 000 | 4.0      | 30 000 000             | 28 100 000             | 6.8      | 5.3              |
| Germany       | 2 301 482                            | 2 028 423 | 13.2     | 4 764 553              | 4 186 422              | 13.8     | 2.1              |
| Italy         | 1 882 921 <sup>1</sup>               | 1 810 501 | 4.0      | 7 908 268 <sup>1</sup> | 7 520 097              | 4.4      | 4.2              |
| Spain         | 1 373 483                            | 1 157 485 | 18.6     | 3 111 995              | 2 554 009              | 21.8     | 9.2              |
| Austria       | 1 198 957                            | 1 053 566 | 13.8     | 4 276 846              | 3 796 837              | 12.6     | 3.6              |
| Great Britain | 768 000                              | 623 000   | 23.3     | 4 318 000              | 3 686 000              | 17.1     | 5.6              |
| Greece        | 361 405                              | 274 418   | 31.7     | 2 891 240 <sup>1</sup> | 2 201 940 <sup>1</sup> | 31.2     | 8.0 <sup>1</sup> |
| Turkey        | 328 825                              | 303 115   | 8.5      | 797 042                | 944 408                | -15.7    | 4.8              |
| Hungary       | 273 000                              | 222 000   | 23.0     | 1 719 900              | 1 393 000              | 23.3     | 6.3              |
| Netherlands   | 201 243                              | 181 300   | 11.0     | 425 040                | 369 600                | 15.0     | 2.1              |

### NORTH & SOUTH AMERICA

|                    |         |         |       |                        |                        |       |                   |
|--------------------|---------|---------|-------|------------------------|------------------------|-------|-------------------|
| USA                | 476 502 | 390 591 | 22.0  | 9 291 789              | 8 593 002 <sup>1</sup> | 7.8   | 19.5              |
| Canada             | 110 723 | 107 220 | 3.2   | 1 755 592              | 1 671 992 <sup>1</sup> | 5.0   | 16.0              |
| Brazil             | 65 951  | 69 995  | -5.8  | 1 582 824 <sup>1</sup> | 1 539 890 <sup>1</sup> | 2.7   | 24.0              |
| Mexico             | 29 550  | 28 675  | 3.1   | 384 150 <sup>1</sup>   | 372 847 <sup>1</sup>   | 3.0   | 13.0 <sup>1</sup> |
| Dominican Republic | 26 522  | 29 577  | -10.3 | 236 311                | 272 700                | -13.3 | 8.9               |

### ASIA / OCEANIA

|           |         |         |      |                      |                      |      |      |
|-----------|---------|---------|------|----------------------|----------------------|------|------|
| Thailand  | 180 720 | 165 582 | 9.1  | 2 909 592            | 2 450 614            | 18.7 | 16.1 |
| Singapore | 79 021  | 74 376  | 6.3  | 238 643              | 226 846              | 5.0  | 3.0  |
| China     | 75 300  | 74 300  | 1.3  | 301 200 <sup>1</sup> | 297 225 <sup>1</sup> | 1.3  | 4.0  |
| Hong Kong | 51 170  | 46 670  | 9.6  | 204 680 <sup>1</sup> | 182 013 <sup>1</sup> | 12.5 | 4.0  |
| Dubai     | 50 557  | 51 870  | -2.5 | 213 390              | 186 548              | 14.3 | 4.2  |

### AFRICA

|              |         |         |       |                      |                      |       |                   |
|--------------|---------|---------|-------|----------------------|----------------------|-------|-------------------|
| Egypt        | 140 148 | 196 714 | -28.8 | 1 606 156            | 1 971 298            | -18.6 | 11.5              |
| Marocco      | 67 636  | 71 640  | -5.6  | 126 000              | 155 661              | -19.1 | 1.9               |
| Tunisia      | 42 486  | 96 319  | -55.9 | 220 927 <sup>1</sup> | 501 085              | -56.0 | 5.2               |
| South Africa | 40 728  | 39 725  | 2.5   | 733 104 <sup>1</sup> | 715 050 <sup>1</sup> | 2.5   | 18.0 <sup>1</sup> |
| Mauritius    | 24 362  | 18 580  | 31.1  | 328 887 <sup>1</sup> | 260 120 <sup>1</sup> | 26.4  | 13.5              |

<sup>1</sup> Estimated i.e. extrapolated; no responsibility taken for this information.  
Source: TRAVEL INSIDE

# TOURISM INFRASTRUCTURE

## TRANSPORT

### PUBLIC TRANSPORT

The public transport route network on railways, roads, lakes and rivers adds up to a total of 27 304 kilometres. 30 656 stopping points are served. In 2012, 2.38 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 20 regional tariff networks.

#### CLIMATE IMPACT ACCORDING TO METHOD OF TRANSPORTATION

| Method of transportation   | Climate impact per kilometre |
|----------------------------|------------------------------|
| Long-distance rail traffic | 7 grams CO <sub>2</sub>      |
| Regional rail traffic      | 11 grams CO <sub>2</sub>     |
| Motor coach                | 53 grams CO <sub>2</sub>     |
| Regional bus               | 107 grams CO <sub>2</sub>    |
| Passenger car              | 194 grams CO <sub>2</sub>    |

Source: Public Transport Association

### ONE OF THE DENSEST RAILWAY NETWORKS IN THE WORLD

The railroad network of Switzerland totals 5 279 kilometres. 2 991 kilometres are part of the Swiss Federal Railways network. The Swiss railways (SBB) operate around 8 000 passenger trains or 375 000 train kilometres per day 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 2012, Swiss Federal Railways carried 354 million passengers. The average journey distance mounted to 50 kilometres. In addition to Swiss Federal Railways, a further 44 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 2011, 119 transport companies transported guests by tram, trolley bus and bus on a 19 335 kilometre-long network (figures include PostBus). Around 15 200 employees were necessary in order to transport the approximately 1.4 billion passengers with buses and trams.

The 814 PostBus routes operate a network of more than 11 000 kilometres. 1 889 PostBus Switzerland Ltd. employees, with an additional 1 582 drivers from PostBus operators, conveyed 130 million passengers with 2 157 Postbuses (163 500 seats & standing places). The vehicles covered an overall distance of 107 million kilometers.

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

**NAVIGATION: ACTIVE LAKE AND RIVER CRUISING IN SWITZERLAND**

In 2012 the 16 companies joined together in the Association of Swiss Navigation Companies (ASNC) transported a total of 12.81 million passengers with 149 boats, approximately 3% more than in 2011 with 12.46 million passengers.

Lake Lucerne once again topped the list with 2.49 million passengers, followed by Lake Geneva with 2.27 million passengers, the Lake Zurich Horgen–Meilen ferry with 2.12 million passengers and Lake Zurich (incl. Limmat River) with 1.76 million passengers.

In terms of distance, on the other hand, performance rose from 2.42 to 2.44 million. Inland waterway transportation covers a network of approx. 1 200 kilometres.

Source: LITRA, public transport information service

**AIR TRAFFIC: ALMOST 44.5 MILLION AIR PASSENGERS**

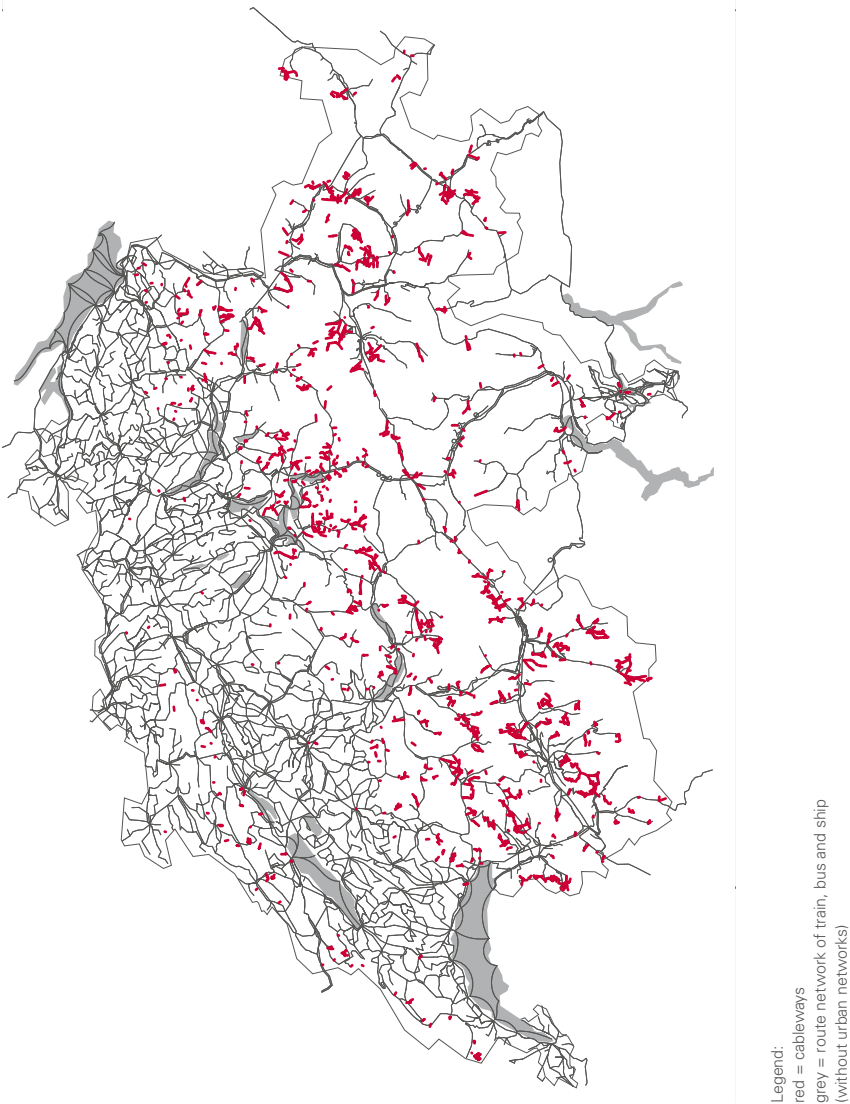
In 2012, Switzerland's airports recorded some 455 422 flight movements (take-offs and landings, only schedule and charter flights), 1% more than in 2011. Of the 44.5 million passengers taking off from or landing in Switzerland, about 136 688 used Switzerland as a transit station.

**FLIGHT MOVEMENTS AND PASSENGERS**

| Airport               | Movements      | Local and transfer<br>passengers | Transit<br>passengers | Total<br>passengers |
|-----------------------|----------------|----------------------------------|-----------------------|---------------------|
| Basel Mulhouse        | 61 754         | 5 322 516                        | 22 206                | 5 344 722           |
| Bern Belp             | 11 211         | 258 543                          | 72                    | 258 615             |
| Genève Cointrin       | 140 329        | 13 785 309                       | 33 588                | 13 818 897          |
| Lugano Agno           | 5 364          | 167 371                          | –                     | 167 371             |
| Sion                  | 550            | 5 678                            | –                     | 5 678               |
| St. Gallen Altenrhein | 3 150          | 115 710                          | –                     | 115 710             |
| Zurich Kloten         | 233 064        | 24 789 083                       | 80 822                | 24 869 905          |
| <b>Total</b>          | <b>455 422</b> | <b>44 444 210</b>                | <b>136 688</b>        | <b>44 580 898</b>   |

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

OVERVIEW OF PUBLIC TRANSPORT AND CABLEWAYS



## MOUNTAIN RAILWAYS: 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 mountain railways occupy a key position in the tourism value creation chain. They are often the driving force in tourist destinations.

- On 1st June 2012 there were 1 190 cantonally (T-bar lifts and small cableways) and 654 federally licensed facilities in Switzerland; totalling 1 749 aerial tramways, funiculars, circulating tramways and T-bar lifts (excluding small ski lifts and conveyor belts). Approximately half of these facilities are T-bar lifts, and 20% are circulating tramways (fixed-grip and detachable chair lifts, circulating cabin cable systems, circulating three-cable tramways and funitels).
- Throughout Switzerland, mountain railways hire 3 300 full-time employees and over 6 550 seasonal workers in transport operations alone. And 3 729 additional positions of employment are being offered in other associated branches, such as gastronomy.
- In its core business of passenger transport, Swiss mountain railways achieved in 2011/12 the sum of CHF 0.94 billion.
- The areas where visitors and locals can take advantage of the Swiss mountain railways spread from the Alps of canton Vaud to Eastern Switzerland and the Graubünden Alps. The cableways from Valais and Graubünden together generate almost two thirds of all passenger transports' incomes in Switzerland.

### EVOLUTION OF TRADE PROCEEDS IN SWITZERLAND (IN 1000)



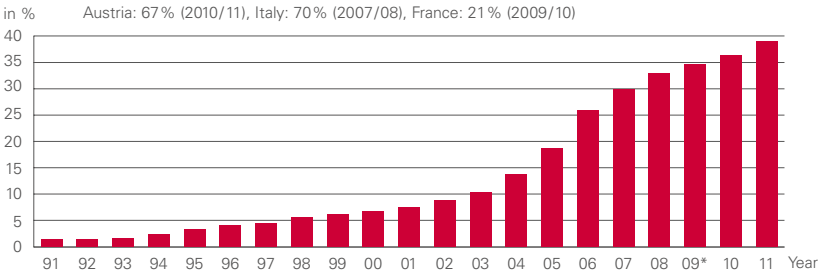
\* Estimate summer 2012

Source: Swiss cableways (SCW), Facts and Numbers in favour of Swiss Cableways Industry 2012; Laurent Vanat, season balance 2011/12

ARTIFICIAL SNOWMAKING

Overall ski area accounts for only 0.5% of Switzerland’s total territory. The slope surface with man-made snow continues to increase and currently represents 39% of the ski area (85.8 km²). In order to develop man-made snow devices, more than CHF 45 million were invested in the business year 2010/11.

PERCENTAGE OF SKI AREA WITH MAN-MADE SNOW COMPARED TO OVERALL PREPARED SKI AREA IN SWITZERLAND



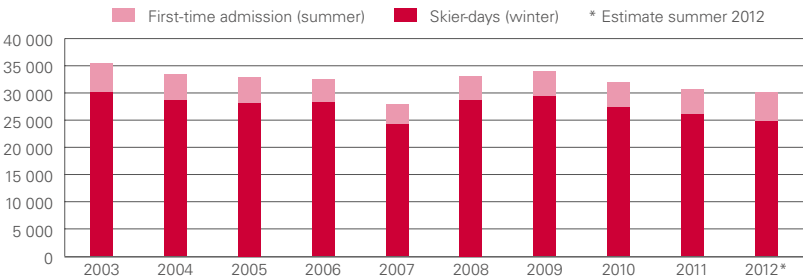
\* Estimated values

Source: Swiss cableways (SCW), Facts and Numbers in favour of Swiss Cableways Industry 2012; ANEF; SNTF; FSÖ

EVOLUTION OF SKIER-DAYS AND FIRST-TIME ADMISSIONS

Development of the Skier-days (first entry per person and day during winter) and first entry during the summer months, 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 AND FIRST-TIME ADMISSIONS IN SWITZERLAND (IN 1000)

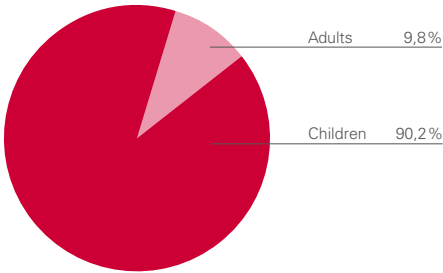


Source: Swiss cableways (SCW), Facts and Numbers in favour of Swiss Cableways Industry 2012; Laurent Vanat, season balance 2011/12

## SWISS SKI AND SNOWBOARD SCHOOLS

In 158 Swiss ski and snowboard 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.

**STATISTIC TEACHED LESSONS FROM SWISS SKI AND SNOWBOARD SCHOOLS**  
**GROUP LESSONS – WINTER 2012/13<sup>1</sup>**



**TOTAL OF TEACHED LESSONS 2012/13<sup>1</sup>**  
**BY REGION**

|                     |                  |
|---------------------|------------------|
| Bern                | 258 379          |
| Graubünden          | 649 053          |
| Eastern Switzerland | 105 811          |
| Ticino              | 9 054            |
| Vaud                | 211 371          |
| Valais              | 559 719          |
| Western Switzerland | 66 521           |
| Central Switzerland | 144 421          |
| <b>Total</b>        | <b>2 004 329</b> |
| Average class size  | 6,22             |

<sup>1</sup> Situation at: 31.5.2013, extrapolative estimate for the season 2012/13. Actual up-to-date figures as of August 2013 at [www.snowsports.ch](http://www.snowsports.ch).  
Source: SWISS SNOWSPORTS

SWITZERLANDMOBILITY

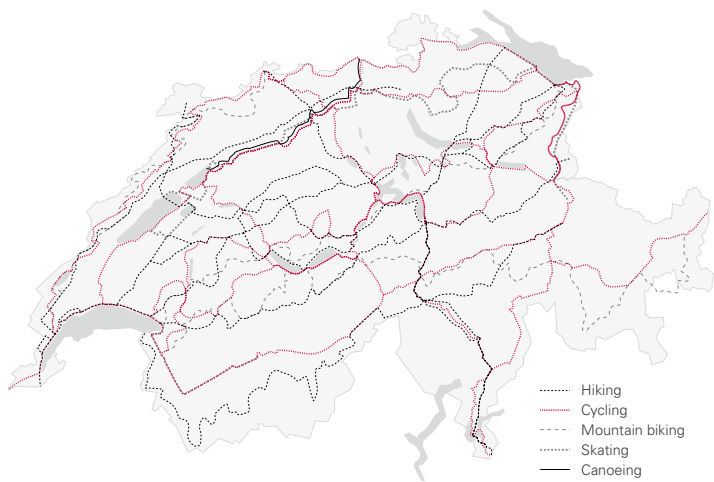
SwitzerlandMobility is the national network of non-motorized traffic for leisure and tourism focusing on the development and communication of the most attractive hiking, cycling, mountain biking, skating, and canoeing routes in Switzerland. SwitzerlandMobility links these routes with public transportation 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               | 60              | 228          | 11 000               |
| Cycling         | 9               | 53              | 59           | 11 000               |
| Mountain biking | 3               | 14              | 136          | 7 200                |
| Skating         | 3               | 13              | 2            | 1 200                |
| Canoeing        | 1               | 8               | 23           | 330                  |
| <b>Total</b>    | <b>23</b>       | <b>148</b>      | <b>448</b>   | <b>30 730</b>        |

Status: 31/12/2012

OVERVIEW MAP OF NATIONAL ROUTES



Source: SwitzerlandMobility

### SALES GENERATED AS A RESULT OF SWITZERLANDMOBILITY

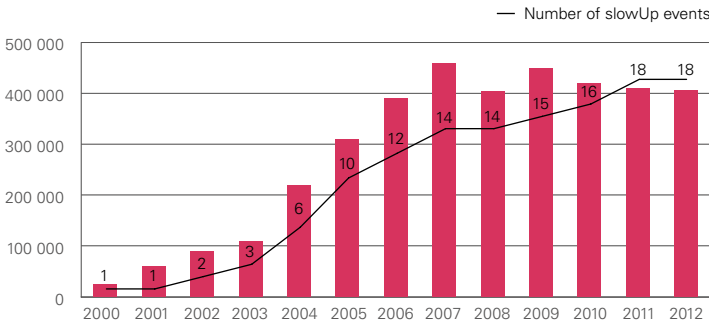
Since SwitzerlandMobility was launched in the spring of 2008, the interest of the Swiss population and foreign tourists has grown steadily: while the web portal schweizmobil.ch registered just over 1 million visits in 2008, the number jumped to over 4.2 million in 2012. In 2011 the LINK-Institute found that about 2 million people, or 24% of the Swiss population, are familiar with Switzerland-Mobility.

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

### 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 2000–2012



#### Participants:

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

SWISS HIKING TRAILS

Switzerland’s network of hiking trails constitutes an important element in the country’s basic tourist infrastructure and is intensively used for recreational purposes. Responsibility for the more than 60 000 kilometres network lies with the cantons.

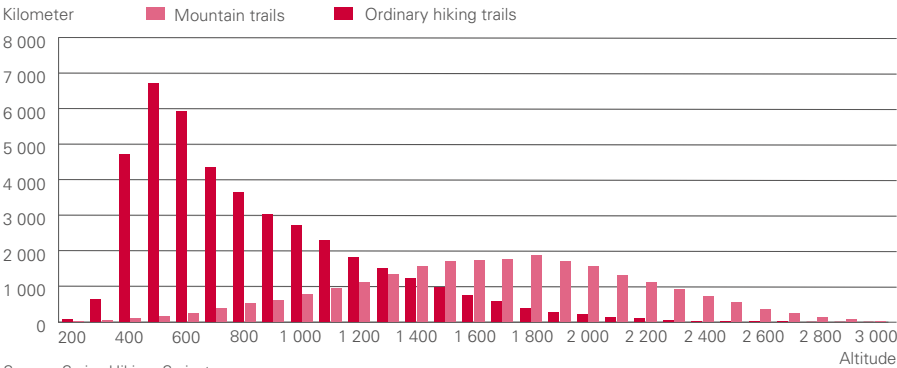
NETWORK OF HIKING TRAILS PER REGION

| Region <sup>1</sup>    | Total network of walks (km) | Paved walks (km) | Mountain walks (km) |
|------------------------|-----------------------------|------------------|---------------------|
| Lake Geneva Region     | 12 105                      | 2 646            | 3 557               |
| Schweizer Mittelland   | 15 399                      | 4 678            | 2 600               |
| North-West Switzerland | 2 850                       | 980              | 7                   |
| Zurich                 | 2 747                       | 972              | 16                  |
| Eastern Switzerland    | 18 972                      | 6 093            | 9 077               |
| Central Switzerland    | 7 902                       | 1 997            | 3 025               |
| Ticino                 | 4 288                       | 624              | 3 425               |
| <b>Total</b>           | <b>64 263</b>               | <b>17 990</b>    | <b>21 707</b>       |

<sup>1</sup> Official FSO main regions of Switzerland  
Source: Swiss Walks

TYPES OF HIKING TRAILS AND THEIR ALTITUDE

There are 42 000 kilometres of ordinary hiking trails, 23 000 kilometres of mountain trails and around 600 kilometres of Alpine trails. They range in altitude from the lowest point in the country to more than 3 000 metres above sea level.



Source: Swiss Hiking, Swisstopo

STATISTICS FOR HIKING IN SWITZERLAND (2008)

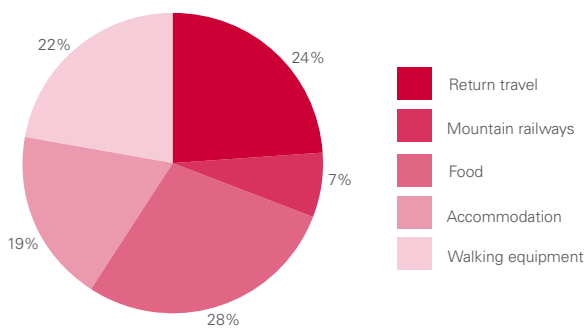
There are around 2 million regular hikers in Switzerland and, on average, they do 20 walks a year. The total number of hiking days per annum is over 40 million.

| Place of residence | Number of hikers | Number of days walked per person | Number of days walked | Day excursions |
|--------------------|------------------|----------------------------------|-----------------------|----------------|
| Switzerland        | 1.96 mn          | 20                               | 39.24 mn              | 32.5 mn        |
| Abroad             | 0.43 mn          | 5                                | 2.26 mn               | 2.26 mn        |
| Total              | 2.39 mn          | 17                               | 41.50 mn              | 34.76 mn       |

Source: The economic essentials of Swiss hiking trails. Federal Roads Office and Swiss Hiking, Bern 2011

BREAKDOWN OF SPENDING BY HIKERS IN SWITZERLAND

Switzerland has around 2.4 million hikers and they spend roughly CHF 1.6 billion per annum on this activity. Of this total, CHF 1.25 billion goes on return travel, mountain railways and meals, as well as overnight accommodation on excursions lasting longer than a day. Spending on hiking equipment amounts to CHF 350 million. Spending by foreign visitors accounts for around CHF 200 million of the total amount spent on hiking.



Source: The economic essentials of Swiss hiking trails. Federal Roads Office and Swiss Hiking, Bern 2011

# FORMAL EDUCATION

## BASIC VOCATIONAL EDUCATION AND TRAINING

**ADVANCED FEDERAL CERTIFICATE (AFC)**

| Hotel and restaurant            | Certificates of qualification issued |       | Apprentices hired |       |
|---------------------------------|--------------------------------------|-------|-------------------|-------|
|                                 | 2012                                 | 2011  | 2012              | 2011  |
| Hotel und Gastrofachmann/-frau  | 39                                   | 36    | 21                | 26    |
| Hotelfachmann/-frau EFZ         | 339                                  | 323   | 367               | 379   |
| Koch/Köchin EFZ                 | 1 754                                | 1 774 | 1 927             | 1 969 |
| Restaurationsfachmann/-frau EFZ | 720                                  | 741   | 684               | 731   |

**Transport services**

|                                        |    |    |    |    |
|----------------------------------------|----|----|----|----|
| Matrose/Matrosin der Binnenschifffahrt | 8  | 9  | 15 | 9  |
| Seilbahn-Mechatroniker/-in EFZ         | 16 | 14 | 23 | 24 |

**Economy and administration**

|                        |     |     |     |     |
|------------------------|-----|-----|-----|-----|
| Kaufmann/-frau B       |     |     |     |     |
| Hotel-Gastro-Tourismus | 37  | 21  | 10  | 11  |
| Öffentlicher Verkehr   | 12  | 10  | 3   | 0   |
| Reisebüro              | 13  | 7   | 1   | 6   |
| Transport              | 7   | 7   | 4   | 5   |
| Kaufmann/-frau E       |     |     |     |     |
| Hotel-Gastro-Tourismus | 223 | 228 | 156 | 147 |
| Öffentlicher Verkehr   | 281 | 244 | 324 | 307 |
| Reisebüro              | 167 | 203 | 192 | 211 |
| Transport              | 32  | 34  | 31  | 39  |

**BASIC FEDERAL CERTIFICATE (BFC)**

|                                 |     |     |     |     |
|---------------------------------|-----|-----|-----|-----|
| Hotel and restaurant            |     |     |     |     |
| Hotellerieangestellte/-r EBA    | 47  | 39  | 43  | 49  |
| Küchenangestellte/-r EBA        | 288 | 264 | 363 | 366 |
| Restaurationsangestellte/-r EBA | 112 | 101 | 129 | 130 |
| Seilbahner/-in                  | 2   | 8   | 3   | 4   |

Source: Swiss Federal Statistical Office

## HIGHER VOCATIONAL EDUCATION AND TRAINING: FINAL EXAMS <sup>1</sup>

| <b>FEDERAL CERTIFICATES</b>                                 | Men | 2011<br>Women | Total | 2010<br>Total | 2009<br>Total |
|-------------------------------------------------------------|-----|---------------|-------|---------------|---------------|
| Bereichsleiter/-in Hotellerie-Hauswirtschaft                | –   | –             | –     | 82            | –             |
| Cabin Crew Member                                           | 19  | 47            | 66    | 59            | 30            |
| Gastro-Betriebsleiter/-in                                   | 15  | 25            | 40    | 24            | –             |
| Gastronomiekoch/-köchin                                     | 71  | 10            | 81    | 82            | 72            |
| Hotelempfangs- und Administrationsleiter/-in                | –   | –             | –     | 9             | –             |
| Koch/Köchin der Spital-, Heim- und Gemeinschaftsgastronomie | 11  | 6             | 17    | 26            | 18            |
| Restaurationsleiter/-in                                     | 9   | 13            | 22    | 24            | 14            |
| Fachmann/-frau im Tourismus-Management                      | –   | –             | –     | –             | 14            |
| Tourismus-Assistent/-in                                     | 6   | 26            | 32    | 25            | 24            |
| Bergführer/-in                                              | 28  | –             | 28    | 23            | 30            |
| Schneesportlehrer/-in                                       | 143 | 47            | 190   | 38            | 19            |
| Seilbahnfachmann/-frau                                      | –   | –             | –     | 43            | 18            |
| Fachmann/-frau im Pisten und Rettungsdienst                 | –   | –             | –     | –             | 27            |

### FEDERAL DIPLOMAS

|                                                 |    |   |    |    |    |
|-------------------------------------------------|----|---|----|----|----|
| Manager/-in Gesundheitstourismus und Bewegung   | –  | – | –  | 11 | –  |
| Manager/-in öffentlicher Verkehr                | –  | – | –  | 20 | –  |
| Betriebsleiter/-in der Gemeinschaftsgastronomie | 15 | 5 | 20 | –  | 14 |
| Küchenchef/-in Produktionsleiter/-in            | –  | – | –  | 30 | –  |
| Restaurateur/-in                                | 10 | 4 | 14 | 20 | 28 |
| Restaurationsleiter/-in                         | –  | – | –  | 6  | –  |
| Tourismus-Experte/Expertin                      | –  | – | –  | 2  | 9  |

### DIPLOMA OF COLLEGES

|                                     |     |     |     |     |     |
|-------------------------------------|-----|-----|-----|-----|-----|
| Hauswirtschaftliche Betriebsleitung | –   | 28  | 28  | 15  | 10  |
| Hotellerie-Gastronomie              | 195 | 252 | 447 | 411 | 411 |
| Tourismus                           | 37  | 159 | 196 | 170 | 299 |

### DIPLOMA OF UNIVERSITIES OF APPLIED SERVICES

|                                                            |     |     |     |     |     |
|------------------------------------------------------------|-----|-----|-----|-----|-----|
| Hotel sector – Certificates issued                         | 248 | 291 | 535 | 345 | 259 |
| Tourism sector (since 2008 Bachelor) – Certificates issued | 43  | 119 | 162 | 107 | 55  |

<sup>1</sup> Data from 2012 will not be available until the end of July 2013.

Source: Swiss Federal Statistical Office

# INTERNATIONAL

## TOURIST ARRIVALS

In 2012 the number of international arrivals grew by 4 %, overstepping the billion mark for the first time. On a global level, tourism can thus be viewed as a growing branch with continuous and stable growth – despite recurring economic lulls, continuing weak Euro exchange and armed conflicts. In contrast, in Switzerland the number of overnight stays in hotels has stagnated since the 90's. As compared to 2011, hotel overnight stays decreased by around 2 % to 34.8 million.

|                               | International arrivals in million |              | Change in %           |             |
|-------------------------------|-----------------------------------|--------------|-----------------------|-------------|
|                               | 2012 <sup>1</sup>                 | 2011         | 2012 <sup>1</sup> /11 | 2011/10     |
| <b>Europe</b>                 | <b>534.8</b>                      | <b>517.5</b> | <b>3.3</b>            | <b>6.1</b>  |
| Northern Europe               | 65.1                              | 64.8         | 0.4                   | 1.6         |
| Western Europe                | 165.8                             | 161.0        | 3.0                   | 4.3         |
| Central/Eastern Europe        | 113.7                             | 105.3        | 8.0                   | 9.8         |
| Southern/Mediterranean Europe | 190.2                             | 186.4        | 2.0                   | 7.4         |
| <b>Asia and Pacific</b>       | <b>232.9</b>                      | <b>218.1</b> | <b>6.8</b>            | <b>6.4</b>  |
| North-East Asia               | 122.8                             | 115.8        | 6.0                   | 3.8         |
| South-East Asia               | 84.0                              | 77.3         | 8.7                   | 10.4        |
| Oceania                       | 12.1                              | 11.7         | 4.0                   | 0.9         |
| South Asia                    | 14.0                              | 13.4         | 4.4                   | 12.0        |
| <b>Americas</b>               | <b>162.1</b>                      | <b>156.3</b> | <b>3.7</b>            | <b>4.0</b>  |
| North America                 | 105.6                             | 102.1        | 3.4                   | 2.8         |
| Caribbean                     | 20.9                              | 20.1         | 4.0                   | 3.0         |
| Central America               | 8.8                               | 8.3          | 6.0                   | 4.4         |
| South America                 | 26.9                              | 25.8         | 4.2                   | 9.4         |
| <b>Africa</b>                 | <b>52.3</b>                       | <b>49.2</b>  | <b>6.3</b>            | <b>-1.1</b> |
| North Africa                  | 18.5                              | 17.1         | 8.7                   | -9.1        |
| Subsaharan Africa             | 33.8                              | 32.2         | 5.0                   | 3.7         |
| <b>Middle East</b>            | <b>52.6</b>                       | <b>55.3</b>  | <b>-4.9</b>           | <b>-6.7</b> |
| <b>World</b>                  | <b>1 035.0</b>                    | <b>996.0</b> | <b>3.8</b>            | <b>4.7</b>  |

<sup>1</sup> Estimate

Source: World Tourism Organization (UNWTO)

## TOP DESTINATIONS

| Rank | Country of destination | International arrivals in million |      | Change in % |         |
|------|------------------------|-----------------------------------|------|-------------|---------|
|      |                        | 2011                              | 2010 | 2011/10     | 2010/09 |
| 1    | France                 | 81.4                              | 77.6 | 4.8         | 1.2     |
| 2    | USA                    | 62.7                              | 59.8 | 4.9         | 8.8     |
| 3    | China                  | 57.6                              | 55.7 | 3.4         | 9.4     |
| 4    | Spain                  | 56.2                              | 52.7 | 6.6         | 1.0     |
| 5    | Italy                  | 46.1                              | 43.6 | 5.7         | 0.9     |
| 6    | Turkey                 | 34.0                              | 31.4 | 8.4         | 3.2     |
| 7    | United Kingdom         | 29.3                              | 28.3 | 3.6         | 0.4     |
| 8    | Germany                | 28.4                              | 26.9 | 5.5         | 10.9    |
| 9    | Malaysia               | 24.7                              | 24.6 | 0.6         | 3.9     |
| 10   | Mexico                 | 23.4                              | 23.3 | 0.5         | 4.2     |
| 30   | Switzerland            | 8.5                               | 8.6  | -1.1        | 4.0     |

| Rank | Country of destination | International tourism receipts<br>in billion US-\$ |       | Change in %<br>based on local currency |         |
|------|------------------------|----------------------------------------------------|-------|----------------------------------------|---------|
|      |                        | 2011 <sup>1</sup>                                  | 2010  | 2011 <sup>1</sup> /10                  | 2010/09 |
| 1    | USA                    | 116.1                                              | 103.5 | 12.2                                   | 9.9     |
| 2    | Spain                  | 59.9                                               | 52.5  | 8.6                                    | 3.9     |
| 3    | France                 | 54.5                                               | 46.9  | 10.7                                   | -0.3    |
| 4    | China                  | 48.5                                               | 45.8  | 5.8                                    | 15.5    |
| 5    | Italy                  | 43.0                                               | 38.8  | 5.6                                    | 1.4     |
| 6    | Germany                | 38.8                                               | 34.7  | 6.7                                    | 5.3     |
| 7    | Macao (China)          | 38.5                                               | 27.8  | 38.7                                   | 53.6    |
| 8    | United Kingdom         | 35.1                                               | 32.4  | 4.4                                    | 8.4     |
| 9    | Australia              | 31.5                                               | 29.1  | -3.8                                   | -0.2    |
| 10   | Hong Kong (China)      | 27.7                                               | 22.2  | 25.0                                   | 35.6    |
| 16   | Switzerland            | 17.5                                               | 14.9  | 0.2                                    | 1.1     |

<sup>1</sup> Estimate

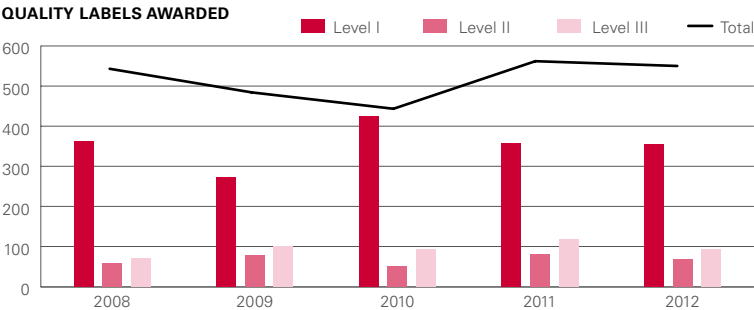
Source: World Tourism Organization (UNWTO)

# 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 twelve industry organisations.

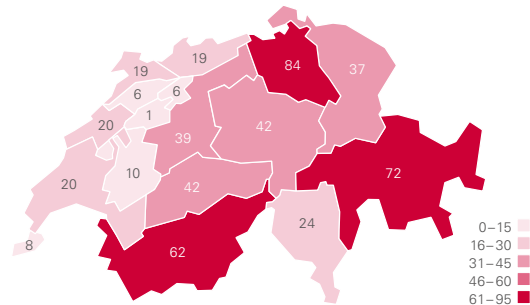


Since 1998 a total of 10 159 individuals have been trained and 6 549 quality labels have been awarded. As compared to 2011, Zurich, Bern and Jura mark the largest increase in current Q-labels; +19 % in gastronomy and +18 % in the leisure and culture branches throughout Switzerland.

**LABELS PER INDUSTRY**

| Industry                    | Labels | in %  | Industry            | Labels     | in %          |
|-----------------------------|--------|-------|---------------------|------------|---------------|
| Hotel industry              | 226    | 43.63 | Gastronomy          | 75         | 14.48         |
| Supplementary accommodation | 47     | 9.07  | Leisure and culture | 28         | 5.41          |
| Tourism organisations       | 55     | 10.62 | <b>Total</b>        | <b>518</b> | <b>100.00</b> |

**LABELS PER REGION**



Source: Swiss Tourism Federation, status as of 31/12/2012

## FAMILIES WELCOME / WELLNESS DESTINATION



Since 1996 Swiss holiday destinations addressing their services to the needs and wishes of families can apply for the 'Families welcome' quality label. In 2012, this quality label was awarded to 24 destinations.



Since 2008 the Swiss Tourism Federation has been awarding a wellness destination quality label to Swiss holiday destinations specialising in wellness services. In 2012 this quality label was awarded to 7 destinations.

### DESTINATIONS CARRYING THE LABEL

#### FAMILIES WELCOME (2013–2015)

|                                       |                                                                                                                                                   |
|---------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------|
| Lake Geneva Region                    | Villars with Gryon and Bex                                                                                                                        |
| Bernese Oberland                      | Diemtigtal   Lenk Simmental   Haslital with Hasliberg and Meiringen                                                                               |
| Valais                                | Nendaz   Leukerbad   <b>new:</b> Zermatt-Matterhorn   Aletsch Arena with Riederalp, Bettmeralp, Eggishorn   Saas-Fee/Saastal   Bellwald   Grächen |
| Lucerne/ Lake Lucerne                 | Engelberg-Titlis   <b>new:</b> UNESCO Biosphere Entlebuch                                                                                         |
| Eastern Switzerland/<br>Liechtenstein | Sonnenecke Bodensee   Toggenburg   Braunwald-Klausenpass   Triesenberg<br>Malbun Steg                                                             |
| Graubünden                            | Flims, Laax, Falera with Trin and Sagogn   Arosa   Davos Klosters   Savognin  <br>Lenzerheide                                                     |
| Ticino                                | <b>new:</b> Ascona Locarno                                                                                                                        |

#### Additionally awarded by the end of 2012:

|                 |                  |
|-----------------|------------------|
| Fribourg Region | Schwarzsee       |
| Valais          | Crans-Montana    |
| Graubünden      | Brigels   Maloja |

### WELLNESS DESTINATIONS

|                  |                     |                      |                     |
|------------------|---------------------|----------------------|---------------------|
| Fribourg Region  | Charmey             | Zurich Region        | Stadt Baden         |
| Bernese Oberland | Gstaad Saanenland   | Graubünden           | Engadin Scuol       |
| Valais           | Leukerbad           | Lucerne/Lake Lucerne | Weggis Vitznau Rigi |
| Bern Region      | Aargau <sup>1</sup> |                      |                     |

<sup>1</sup> Bad Zurzach, Bad Schinznach, Rheinfelden

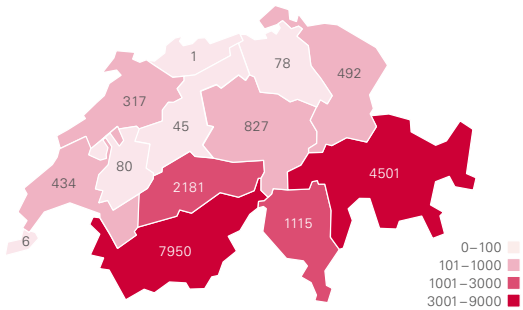
Source: Swiss Tourism Federation



CLASSIFICATION OF HOLIDAY APARTMENTS  
AND GUEST ROOMS

The Swiss Tourism Federation classifications comply with international standards and are aimed at providing an idea about the quality and services of holiday apartments and guest rooms in Switzerland. The compliance to expected quality is monitored regularly.

AWARDED CERTIFICATES 2012



A detailed overview of the regional distribution is found on page 27 of this brochure.  
Source: Swiss Tourism Federation

ENVIRONMENTAL AND SUSTAINABILITY LABELS



The **European Ecolabel for tourist accommodation** indicates to guests that the marked establishment uses energy and water sparingly, reduces waste products and has a preference for the use of environmentally friendly materials.



**ibex fairstay** examines the sustainable performance of lodging establishments throughout the country in terms of environment, social aspects, regional roots, efficiency and management. Ibex fairstay labels are awarded in bronze, silver, gold, or platinum.

| Year              | 2012 | 2011 | 2010 | 2009 | 2008 | 2007 | 2006 |
|-------------------|------|------|------|------|------|------|------|
| European Ecolabel | 52   | 45   | 35   | 7    | 14   | 1    | 5*   |
| ibex fairstay     | 59   | 61   | 54   | 39   | 31   | 12   | 16   |

\* Official introduction in Switzerland  
Source: SALADINO Umweltprojekte, ibex fairstay

# TOURISM ASSOCIATIONS AND INSTITUTES

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## Tourism interest groups and professional associations

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### **Agritourism Switzerland**

Finkenhubelweg 11, P.O. Box 8275, 3001 Bern, phone +41 (0)31 307 47 40, fax +41 (0)31 307 47 48, [www.agrotourismus.ch](http://www.agrotourismus.ch), [info@agrotourismus.ch](mailto:info@agrotourismus.ch). Umbrella organisation for the marketing and coordination of agritourist services in Switzerland with over 600 members.

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

Secretariat, Zürichstr. 78, 8118 Pfaffhausen, phone +41 (0)43 355 57 82, fax +41 (0)43 355 57 93, [www.vdh.ch](http://www.vdh.ch), [welcome@vdh.ch](mailto:welcome@vdh.ch). Networking, further education and friendship care for students of the postdiploma course 'Unternehmensführung resp. Nachdiplom-studium HF-NDS' of hotelleriesuisse.

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### **Association of Swiss Tourism Managers (ASTM)**

c/o FST, P.O. Box 8275, 3001 Bern, phone +41 (0)31 307 47 43, fax +41 (0)31 307 47 48, [www.vstm.ch](http://www.vstm.ch), [info@vstm.ch](mailto:info@vstm.ch). Representation of the professional interests of tourist office managers. Professional development, advisory service, lobbying.

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### **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](http://www.vssu.ch). Safeguarding the interests of the 16 member shipping companies.

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### **Bed and Breakfast Switzerland**

P.O. Box 190, 1752 Villars-sur-Glâne 1, phone +41 (0)79 627 95 49, fax +41 (0)26 400 06 76, [www.bnb.ch](http://www.bnb.ch), [admin@bnb.ch](mailto:admin@bnb.ch). Organisation of Swiss BnB host families. Purpose: information, promotion, publication of the 'Bed and Breakfast Switzerland Guide', quality standards.

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### **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](http://www.ist-zurich.ch), [info@ist-zurich.ch](mailto: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.

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### **CONTACT groups.ch – Hotels and Holiday Homes for Groups**

Spitzackerstrasse 19, P.O. Box, 4410 Liestal, phone +41 (0)61 926 60 00, fax +41 (0)61 911 88 88, [www.groups.ch](http://www.groups.ch), [www.seminar-groups.ch](http://www.seminar-groups.ch), [m.groups.ch](http://m.groups.ch), [contact@groups.ch](mailto:contact@groups.ch). Organisation of the hotels and holiday homes for groups in Switzerland. Services: worldwide marketing, consultation and settlement services, travel insurance specifically for groups, central rental agency (no commissions).

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### **GastroSuisse**

Blumenfeldstrasse 20, P.O. Box, 8046 Zurich, phone +41 (0)848 377 111, fax +41 (0)848 377 112, [www.gastrosuisse.ch](http://www.gastrosuisse.ch), [info@gastrosuisse.ch](mailto: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.

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### **hotelleriesuisse (Swiss Hotel Association)**

Monbijoustrasse 130, P.O. Box, 3001 Bern, phone +41 (0)31 370 41 11, fax +41 (0)31 370 44 44, [www.hotelleriesuisse.ch](http://www.hotelleriesuisse.ch), [welcome@hotelleriesuisse.ch](mailto: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.

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**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](http://www.hotelgastrounion.ch), [info@hotelgastrounion.ch](mailto:info@hotelgastrounion.ch). Union of employees, professionals and management staff of the hotel/restaurant trade of bakers and confectioners.

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**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](mailto: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).

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**Safety in adventures**

Office: beco Berner Wirtschaft, Münsterplatz 3, 3011 Bern, [www.safetyinadventures.ch](http://www.safetyinadventures.ch), [info@safetyinadventures.ch](mailto:info@safetyinadventures.ch), Certification Body: SQS, Luigi Arigoni, phone +41 (0)81 356 00 21, fax +41 (0)81 356 00 22, [luigi.arigoni@sqs.ch](mailto:luigi.arigoni@sqs.ch). The foundation supports the cause of safety for adventure and outdoor activities offered on a commercial basis in Switzerland. Certification procedure on the basis of a safety concept; certified undertakings are awarded a safety label.

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**‘schlaf im Stroh!’ (siS)**

Brünigstrasse 49, 6078 Lungern, phone +41 (0)41 678 12 86, fax +41 (0)41 678 12 88, [www.schlaf-im-stroh.ch](http://www.schlaf-im-stroh.ch), [info@schlaf-im-stroh.ch](mailto:info@schlaf-im-stroh.ch). The objective of this Swiss Association is the promotion of agritourist services associated with the protected trademark ‘schlaf im Stroh!’ (‘Sleep in Straw’) and its quality charter, as well as supporting the hosts providing these services.

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**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](http://www.voev.ch), [info@voev.ch](mailto:info@voev.ch).

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**Swiss Cableways**

Dählhölzliweg 12, 3000 Bern 6, phone +41 (0)31 359 23 33, fax +41 (0)31 359 23 10, [www.seilbahnen.org](http://www.seilbahnen.org), [info@seilbahnen.org](mailto:info@seilbahnen.org). To safeguard the interests of the members, information and consultation services, common policies on tariffs and standardized tickets, vocational training and advanced training for personnel at all levels.

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**swisscamps**

Swiss Camping Association, Bahnhofstrasse 5, 3322 Schönbühl, phone +41 (0)31 852 06 26, fax +41 (0)31 852 06 27, [www.swisscamps.ch](http://www.swisscamps.ch), [info@swisscamps.ch](mailto:info@swisscamps.ch). Established in 1975. Promotion of camping vacations and classification of camp sites.

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**Swiss Centre for mountain regions (SAB)**

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

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**SWISS CITIES**

c/o Switzerland Tourism, Tödistrasse 7, 8027 Zurich, phone +41 (0)44 288 13 23, fax +41 (0)44 288 12 07, [www.MySwitzerland.com/cities](http://www.MySwitzerland.com/cities), [swisscities@switzerland.com](mailto:swisscities@switzerland.com). Community of interests of 24 cities for the marketing in Switzerland and abroad.

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**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](http://www.wandern.ch), [info@wandern.ch](mailto:info@wandern.ch). Umbrella organisation of 26 cantonal hiking associations. Promotes hiking trails and hiking in Switzerland.

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**Swiss Holiday Farms**

Bleihofstrasse, Feierlenhof, 8595 Altnau, phone +41 (0)71 695 23 72, fax +41 (0)71 695 23 67, [www.agrotourismus.ch](http://www.agrotourismus.ch), [www.bauernhof-ferien.ch](http://www.bauernhof-ferien.ch), [www.reka.ch](http://www.reka.ch), [info@feierlenhof.ch](mailto:info@feierlenhof.ch). Support of the members, information and consultation services, basic and advanced training of host families. Quality standards (seal of quality) and classifications. Central booking office at Swiss Travel Savings Fund.

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**SWISS SNOWSPORTS**

Hühnerhubelstrasse 95, 3123 Belp, phone +41 (0)31 810 41 11, fax +41 (0)31 810 41 12, [www.snowsports.ch](http://www.snowsports.ch), [www.schweizer-skischule.ch](http://www.schweizer-skischule.ch), [info@snowsports.ch](mailto:info@snowsports.ch), [info@schweizer-skischule.ch](mailto: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.

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**Swiss Spa**

Bahnhofstrasse 2, 9100 Herisau, phone +41 (0)71 350 14 14, fax +41 (0)71 350 14 18, [www.swissthermalspa.ch](http://www.swissthermalspa.ch), [info@swissthermalspa.ch](mailto:info@swissthermalspa.ch). To safeguard and promote the economic, legal, social and scientific interests of the Swiss thermal spas. In particular, the association commits itself to respect the qualitative standards imposed by the legal prescriptions related to thermal spas.

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**Swiss Tourism Federation (STF)**

Finkenhubelweg 11, P.O. Box 8275, 3001 Bern, phone +41 (0)31 307 47 47, fax +41 (0)31 307 47 48, [www.swisstourfed.ch](http://www.swisstourfed.ch), [info@swisstourfed.ch](mailto: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.

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**Swiss Travel Savings Fund (reka)**

Neuengasse 15, 3001 Bern, phone +41 (0)31 329 66 33, fax +41 (0)31 329 66 01, [www.reka.ch](http://www.reka.ch), [info@reka.ch](mailto:info@reka.ch). The promotion of social and family tourism, vacation financing by issuing reka currency, running of reka vacation centres, vacation apartment rentals.

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**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](http://www.youthhostel.ch), [contact@youthhostel.ch](mailto:contact@youthhostel.ch). Promotion of youth and family travel, accommodation for young travellers, youth groups, schools, families etc.

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**SwitzerlandMobility**

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

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**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](http://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.

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**Wellbeing Switzerland**

Office of Swiss Health Hotels, Bahnhofstrasse 2, 9100 Herisau, phone +41 (0)71 350 14 14, fax +41 (0)71 350 14 18, [www.wohlbefinden.com](http://www.wohlbefinden.com), [info@wohlbefinden.com](mailto:info@wohlbefinden.com). Representing the interests of health hotels, rehabilitation and convalescent homes.

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## Public corporations

### Swiss Association for Hotel Credit (SGH)

Gartenstrasse 25, P.O. Box, 8027 Zurich, phone +41 (0)44 209 16 16, fax +41 (0)44 209 16 17, [www.sgh.ch](http://www.sgh.ch), [info@sgh.ch](mailto: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](http://www.MySwitzerland.com), [info@myswitzerland.com](mailto: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, Holzkofenweg 36, 3003 Bern, phone +41 (0)31 322 27 58, fax +41 (0)31 323 12 12, [www.seco.admin.ch](http://www.seco.admin.ch).

Central federal authority for national and international tourism policies.

### Swiss Federal Statistical Office

Tourism Subdivision, Espace de l'Europe 10, 2010 Neuchâtel, phone +41 (0)32 867 24 40, fax +41 (0)32 713 62 15, [www.statistik.admin.ch](http://www.statistik.admin.ch), [info-tour@bfs.admin.ch](mailto: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, reports on special subjects).

## 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](http://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](http://www.hslu.ch/itw), [itw@hslu.ch](mailto: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 of Western Switzerland)

TechnoPôle 3, 3960 Sierre, phone +41 (0)27 606 90 01, fax +41 (0)27 606 90 00, [www.hevs.ch](http://www.hevs.ch), [info.ito@hevs.ch](mailto: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 University of Applied Sciences HTW Chur

Comercialstrasse 22, 7000 Chur, phone +41 (0)81 286 39 54, fax +41 (0)81 286 39 49, [www.itf.ch](http://www.itf.ch), [itf@htwchur.ch](mailto:itf@htwchur.ch).

BSc and MSc study programmes and further education (CAS, MAS, EMBA) in tourism and leisure management. Applied research and consultation in the areas of destination management, hospitality, client management, and sustainability.

### 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, fax +41 (0)31 631 34 15, [www.cred.unibe.ch](http://www.cred.unibe.ch), [info@cred.unibe.ch](mailto: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.

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**International Tourism Organisations**

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**European Travel Commission (ETC)**

Rue du Marché aux Herbes 61, 1000 Brussels, Belgium, phone +32 2 502 01 13, fax +32 2 514 18 433, [www.etc-corporate.org](http://www.etc-corporate.org),  
[info@etc-corporate.org](mailto:info@etc-corporate.org).

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**EUROSTAT**

Joseph Bech Building, 5, rue Alphonse Weicker, 2721 Luxembourg, phone +35 2 4301 33444, fax +35 2 4301 35349,  
[www.epp.eurostat.ec.europa.eu](http://www.epp.eurostat.ec.europa.eu), [eurostat-pressoffice@ec.europa.eu](mailto:eurostat-pressoffice@ec.europa.eu).

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**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](http://www.hotrec.eu),  
[hotrec@hotrec.eu](mailto:hotrec@hotrec.eu).

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**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](http://www.unwto.org), [wtobc@unwto.org](mailto:wtobc@unwto.org).

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