

STV  **FST**

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

SWISS TOURISM IN FIGURES 2013

STRUCTURE AND INDUSTRY DATA

PARTNERSHIP. POLITICS. QUALITY.



Edited by

Swiss Tourism Federation (STF)

In cooperation with

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

Imprint

Production: Béatrice Herrmann, STF | Photo: Melanie Weber, STF | Print: Länggass Druck AG, 3000 Bern

The data in this publication is the latest available. The publication is also obtainable on www.swisstourfed.ch.
Bern, July 2014

CONTENTS



AT A GLANCE	4
LEGAL BASES	5
TOURIST REGIONS	7
TOURISM – AN IMPORTANT SECTOR OF THE ECONOMY	8
TRAVEL BEHAVIOUR OF THE SWISS RESIDENTIAL POPULATION	15
ACCOMMODATION SECTOR	17
HOTEL AND RESTAURANT INDUSTRY	33
OUTGOING	38
TOURISM INFRASTRUCTURE	39
FORMAL EDUCATION	52
INTERNATIONAL	54
QUALITY PROMOTION	56
TOURISM ASSOCIATIONS AND INSTITUTES	59

AT A GLANCE

Due to reference sources, figures either concern the year 2012 or 2013.

EARNINGS AND EMPLOYMENT 2012

Total revenue from Swiss tourism	34.9 billion
Revenue from tourist accommodation, meals or transportation	18.3 billion
Tourism employment	146 259 full-time employees

KEY INDICATORS FOR TOURISM: DEVELOPMENTS

	2013	2012	2011	2010	2009
Supply					
Hotel beds	271 298	271 168	273 969	275 193	273 974
Demand: arrivals (in 1000)					
Hotels and health establishments	16 831	16 298	16 229	16 203	15 564
Campsites	891	917	907	932	1050
Youth hostels	480	459	453	471	476
Demand: overnight stays (in 1000)					
Hotels and health establishments	35 624	34 766	35 486	36 208	35 589
Campsites	2 864	2 964	3 057	3 281	3 654
Youth hostels	947	917	905	939	946
Duration of stay (nights)					
Hotels and health establishments	2.1	2.1	2.2	2.2	2.3
Campsites	3.2	3.2	3.4	3.5	3.5
Youth hostels	2.0	2.0	2.0	2.0	2.0
Occupancy rate in hotels and health establishments (in % of bed capacity, gross)					
	36.0	35.0	35.5	36.0	35.6
Tourism Balance of Payments (in million CHF)					
Revenues from foreign tourists in Switzerland	15 647.1	15 097.4	15 185.4	15 355.6	15 376.6
Expenditures of Swiss tourists abroad	14 879.6	14 256.4	12 127.6	11 643.5	11 846.7
Balance	767.5	841	3 057.9	3 712.1	3 529.8

Source: Swiss Federal Statistical Office, Indicators of the Tourism Satellite Account, Tourist accommodation statistics and Tourism Balance of Payments

LEGAL BASES

NATIONAL TOURISM LAWS

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 1966 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	www.ag.ch	Location Development Act of 1 January 2010
Appenzell Innerrhoden	www.ai.ch	Promotion of Tourism Act of 25 April 1999
Appenzell Ausserrhoden	www.ar.ch	Tourism Act of 25 April 1976
Basel-Landschaft	www.bl.ch	Tourism Act of 19 June 2003
Basel-Stadt	www.bs.ch	Location Development Act of 29 June 2006
Bern	www.be.ch	Tourism Development Act of 20 June 2005
Fribourg	www.fr.ch	Tourism Act of 13 October 2005
Geneva	www.ge.ch	Tourism Act of 24 June 1993
Glarus	www.gl.ch	Tourism Development Act of 6 May 2007
Graubünden	www.gr.ch	Economic Development Act of 11 February 2004
Jura	www.jura.ch	Tourism Act of 31 May 1990
Lucerne	www.lu.ch	Tourism Act of 30 January 1996
Neuchâtel	www.ne.ch	Tourism Act of 25 June 1986
Nidwalden	www.nw.ch	Tourism Act of 25 April 1971
Obwalden	www.ow.ch	Tourism Act of 3 May 2012
St. Gallen	www.sg.ch	Tourism Act of 26 November 1995
Schaffhausen	www.sh.ch	Law on Contributions to the Cantonal Tourism Organisation of 16 June 2008
Solothurn	www.so.ch	No tourism law
Schwyz	www.sz.ch	Law on Economic Development of 27 November 1986
Thurgau	www.tg.ch	Law on Actions against Unemployment and for Location Development of 28 November 1988
Ticino	www.ti.ch	Tourism Act of 30 November 1998
Uri	www.ur.ch	Tourism Promotion Act of 23 September 2012
Vaud	www.vd.ch	Promotion of Tourism Act of 12 June 2007
Valais	www.vs.ch	Tourism Act of 9 February 1996
Zug	www.zug.ch	Tourism Act of 27 March 2003
Zurich	www.zh.ch	No tourism law

TOURIST REGIONS



© Swiss Federal Statistical Office, ThemaKart
As of 2014

- 1 **Graubünden:** Canton of Graubünden.
- 2 **Eastern Switzerland:** Cantons of Glarus, Appenzell Ausserrhoden, Appenzell Innerrhoden, Thurgau, Schaffhausen (excluding parts of the district of Schaffhausen) and St. Gallen (excluding parts of the district of See-Gaster).
- 3 **Zurich Region:** Cantons of Zurich, of Zug; Canton of Aargau: parts of the districts of Baden, Bremgarten and Zurzach; Canton of Schwyz: district of Höfe and part of district of March; Canton of St. Gallen: parts of See-Gaster district; Canton of Schaffhausen: part of district Schaffhausen.
- 4 **Lucerne / Lake Lucerne:** Cantons of Luzern, Uri, Obwalden and Nidwalden; Canton of Schwyz (excluding the district of Höfe and parts of the district of March); Canton of Aargau: district Muri, parts of Kulm and Lenzburg districts.
- 5 **Basel Region:** Cantons of Basel-Stadt and Basel-Landschaft; Canton of Solothurn: districts Dorneck and Thierstein, parts of districts Thal and Gösgen; Canton of Aargau: districts Laufenburg, Rheinfelden, parts of districts of Zurzach, Aarau and Brugg.
- 6 **Bern Region:** Canton of Bern: districts of Emmental, Oberaargau, Bern-Mittelland, parts of districts of Seeland and of Thun; Canton of Solothurn: districts of Olten, Gäu, parts of district of Gösgen; canton Aargau: district of Zofingen, parts of district Aarau, Baden, Brugg, Bremgarten, Kulm and Lenzburg.
- 7 **Bernese Oberland:** Canton of Bern: districts of Frutigen-Niedersimmental, Interlaken-Oberhasli, Obersimmental-Saenen, part of the district of Thun.
- 8 **Jura & Three-Lakes:** Cantons of Neuchâtel, Jura; Canton of Bern: districts of Bernese Jura, Biel/Bienne, part of Seeland; canton of Solothurn: district of Solothurn, Bucheggberg, Lebern, part of the districts of Thal and Wasseramt.
- 9 **Lake Geneva Region (Vaud):** Canton of Vaud.
- 10 **Geneva:** Canton of Geneva.
- 11 **Valais:** Canton of Valais.
- 12 **Ticino:** Canton of Ticino.
- 13 **Fribourg Region:** Canton of Fribourg.

TOURISM – AN IMPORTANT SECTOR OF THE ECONOMY

Domestic and international tourism are important factors in the Swiss economy. Of a total revenue of CHF 34.9 billion in 2012, 18.3 billion or almost 52.3 % came from tourist accommodation, meals or transportation. These three tourism products are responsible for 58.8 % of the total value added from tourism.

TOURISM – AN INVISIBLE EXPORT

The expenditure of foreign guests in Switzerland has the same effect on the Swiss balance of payments as the export of goods and services. In 2012, approximately 4.9 % of Switzerland's export revenue come from tourism.¹

EXPORT REVENUE

Industry	2013 CHF bn	2012 CHF bn	2011 CHF bn	2010 CHF bn	2009 CHF bn
Chemical industry	80.9	79.0	74.6	75.9	71.8
Metal and machine industry	60.0	59.4	64.0	63.6	58.1
Watchmaking industry	21.8	21.4	19.3	16.2	13.2
Tourism (Tourism Balance of Payments)	15.6	15.1	15.2	15.4	15.4
Merchanting ²	–	19.1	19.7	19.8	14.4
Bank financial services ²	–	15.1	15.1	16.5	17.8

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

² Data for 2013 not yet available. Data for 2005–2012 taken from the Swiss National Bank's (SNB) publication «Swiss Balance of Payments 2012». They follow the standards of the Balance of Payments Manual, 5th edition and will be revised by the SNB in 2014.

Source: Swiss Federal Statistical Office, Swiss National Bank

LARGEST SHARE OF INCOME FROM TRAVEL WITH OVERNIGHT STAYS

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

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

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

TOURISM BALANCE OF PAYMENTS

Revenue / Expenditure in billion CHF	Revenue from foreign tourists			Expenditure of Swiss tourists abroad		
	2013 ²	2012 ¹	2011	2013 ²	2012 ¹	2011
Tourism, including overnight stays	10.6	10.4	10.4	11.1	10.5	9.2
Visitors staying in lodging facilities and with relatives	7.4	7.3	7.7			
Educational & medical stays	3.2	3.1	2.8			
Excursionists, transit visitors, other tourism	2.7	2.5	2.7	3.7	3.7	2.9
Consumption expenditure of border workers incl. short-term residents (< 4 months)	2.3	2.2	2.1			
Total	15.6	15.1	15.2	14.9	14.3	12.1

¹ Revised figures

² Provisional figures

Source: Swiss Federal Statistical Office, Tourism balance of payments

THE SATELLITE ACCOUNT: CAPTURING THE ECONOMIC IMPORTANCE OF TOURISM

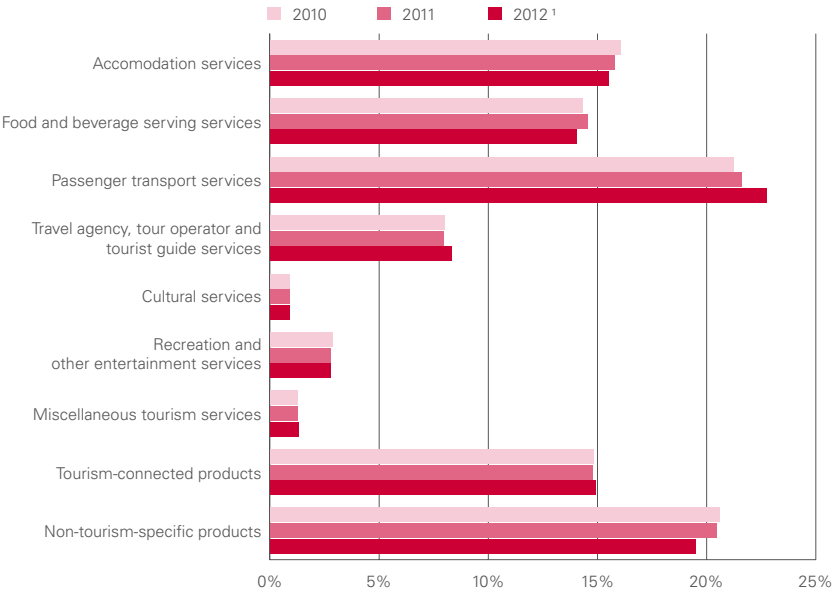
The main challenge in capturing economic statistics of tourism is the fact that economic statistics are generally supply-side oriented. The NOGA division into different industries is based on the goods and services they mainly produce. By contrast, tourism as a cross-sectional sector includes several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

Switzerland's last Tourism Satellite Account was the 2008 Tourism Satellite Account. For 2011, a new Tourism Satellite Account (TSA) was compiled in June 2014. The NOGA (Nomenclatures – General Classification of Economic Activities) 2008 and EUROSTAT's new provisions concerning the compilation of the Tourism Satellite Account are considered in the new satellite account. The previous Tourism Satellite Accounts (TSA 2001, TSA 2005 and TSA 2008) will be revised over time. After the compilation of the 2011 Tourism Satellite Account, annual indicators in the satellite account will be revised pursuant to the results of the TSA. This means that a new indicator system will emerge that is incomparable with the previous series. After all the old TSAs have been revised, the TSA indicators from 2001 to 2010 will also be revised.

POSITIVE DEMAND DESPITE DECREASE IN ACCOMMODATION SERVICES AND FOOD AND BEVERAGE SERVING SERVICES

Overall demand increased slightly compared with the previous year. This was despite the decrease in demand for accommodation services (–1.4 %) and food and beverage serving services (–3 %). Other areas that showed a decline in 2012 were cultural services (–1 %) and non-tourism-specific products (–4.6 %). Compared to this decline, demand for passenger transport services (+5.8 %) and travel agency, tour operator and tourist guide services has increased (+5 %). This high increase in these two products together with the rise in various services (+4.7 %) has prevented an overall negative result for tourist demand.

SHARES OF THE TOURISM INDUSTRY IN SWITZERLAND



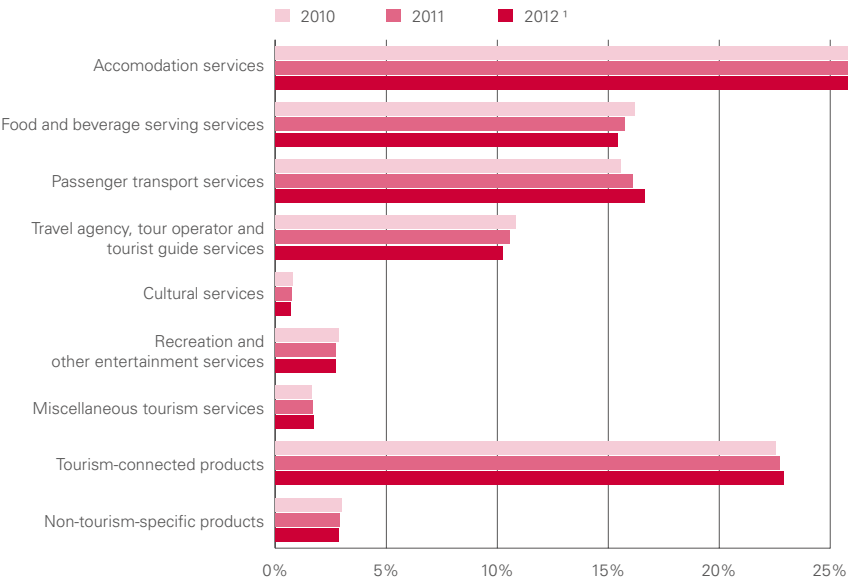
¹ First estimate

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

VALUE ADDED STABLE

Tourism’s total gross value added did not change in 2012. Although value added fell for accommodation (–0.5 %), food and beverage serving services (–2 %), travel agency, tour operator and tourist guide services (–2.7 %) and cultural services (–6.3 %), an increase was seen for the products passenger transport (+3.4 %), miscellaneous tourism services (+3.4 %) as well as for tourism-characteristic products (+0.9 %), thus safeguarding the overall stability of the gross value added. Although demand among travel agency, tour operator and tourist guide services has increased, the value added has shrunk noticeably. The reason for this was considerable growth in intermediate consumption for the travel industry. The trend in accommodation services, food and beverage serving services and passenger transport services corresponds to the picture of the overall demand.

SHARE OF TOURISM GROSS VALUE ADDED ACCORDING TO PRODUCTS

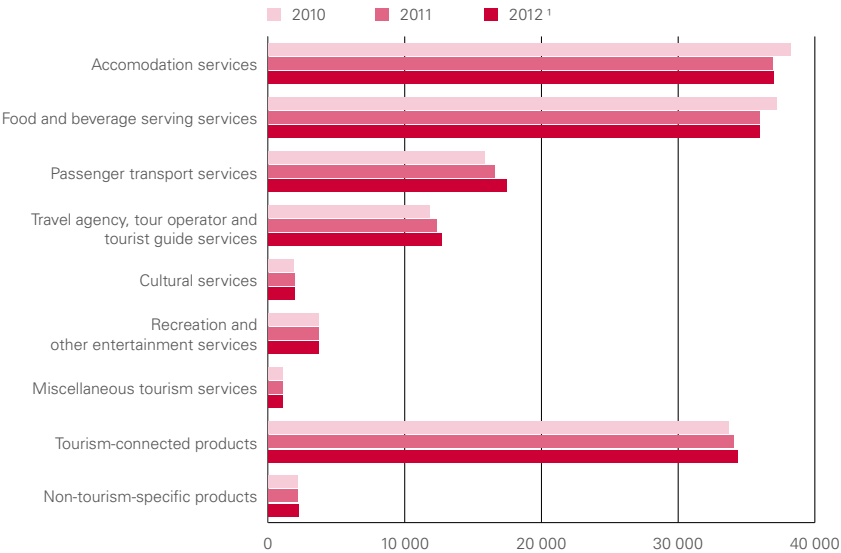


¹ First estimate
Source: Swiss Federal Statistical Office, Annual indicators of the Tourism Satellite Account

INCREASED TOURISM EMPLOYMENT

While growth in the products accommodation services (+0.1 %) and food and beverage serving services (0.0 %) remained almost unchanged compared with the previous year, total employment in the tourism sector increased by more than 1 % in 2012. In 2012, tourism employment was equal to 146,259 full-time equivalent jobs. The product passenger transport services continued its trend of development and continued to show strong tourist employment growth of 5.5 %.

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



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

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

		2013	2012	2011	2010	2009	2008
Service industry	Total	2 549.5	2 501.1	2 447.1	2 413.1	2 390.5	2 379.9
	Men	1 374.1	1 349.0	1 323.7	1 305.0	1 294.2	1 295.9
	Women	1 175.4	1 152.1	1 123.3	1 108.1	1 096.3	1 084.0
Accommodation	Total	62.4	62.6	64.5	67.3	66.9	67.9
	Men	29.9	29.9	30.8	31.8	31.0	31.0
	Women	32.5	32.8	33.7	35.5	36.0	36.9
Food and beverage service activities	Total	104.7	106.4	109.7	113.4	114.1	118.2
	Men	54.2	54.3	55.8	57.5	56.9	57.8
	Women	50.5	52.1	53.9	56.0	57.2	60.4
Land transport and transport via pipelines	Total	96.4	94.6	91.8	90.2	89.3	89.7
	Men	83.6	82.0	79.9	78.4	78.0	78.5
	Women	12.8	12.5	11.9	11.7	11.3	11.2
Water transport and air transport	Total	13.4	12.7	11.8	10.6	10.8	11.1
	Men	8.3	7.8	7.2	6.4	6.4	6.5
	Women	5.1	4.8	4.6	4.2	4.4	4.6

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

	2013 4th quarter	2013 3rd quarter	2013 2nd quarter	2013 1st quarter	2012 4th quarter
Full-time jobs (90 % and over)	136.6	136.2	136.7	136.9	136.8
Men	76.9	75.7	76.4	76.2	76.4
Women	59.7	60.5	60.3	60.7	60.4
Part-time jobs I (50–89 %)	37.3	38.7	37.6	37.1	38.8
Part-time jobs II (< 50 %)	34.5	34.8	33.1	32.8	34.1
Total number of jobs (overall)	208.4	209.6	207.5	206.8	209.8
Men	95.6	93.6	94.7	93.9	94.8
Women	112.8	116.0	112.8	112.8	114.9

Source: Swiss Federal Statistical Office, Employment statistic

TRAVEL BEHAVIOUR OF THE SWISS RESIDENTIAL POPULATION

In 2012, 86 % of the Swiss population¹ undertook at least one trip with one or more overnight stays away from home. After a downward trend, the number of trips with overnight stays of the resident population aged 15 or over started to increase again: a total of 18.8 million trips were made, of which 6.7 million were within Switzerland. On average 2.9 trips were made per person, of which one had a domestic destination.

While women and men make about the same number of trips, a comparison between different age groups shows differences in travel behaviour. Whereas people aged 25 to 44 were the most frequent travellers, taking 3.3 trips per year, people aged 65 or over took an average of 1.9 trips with overnight stays.

NUMBER OF TRIPS (IN 1000)

	2012	2011	2010	2009	2008
Trips with overnight stays	18 752	16 245	16 595	17 183	20 069
Day trips	64 625	63 823	67 904	75 451	78 654

In addition to trips with overnight stays, data on day trips are also collected. The Swiss resident population undertook a total of 64.6 million day trips in 2012, corresponding to an average of 9.9 trips per person. Differences between language regions are observed. People living in the French-speaking part of Switzerland undertook 5.2 day trips, whereas one from the German- or Italian-speaking population made 11.4 and 9.9 trips per year respectively.

NUMBER OF TRIPS (PER PERSON)

	2012	2011	2010	2009	2008
Trips with overnight stays	2.9	2.5	2.6	2.7	3.2
Day trips	9.9	9.9	10.7	12.0	12.7

¹ Swiss resident population aged 15 or over: 6 559 350 persons
Source: Swiss Federal Statistical Office, Survey of travel behaviour 2012

TRAVEL DESTINATIONS

Of the 18.8 million trips with overnight stays recorded in 2012, 35 % had a domestic destination and 65 % a foreign destination. 41 % of trips led to countries that border Switzerland, namely Germany (15 %), France (11 %) and Italy (10 %). Finally, 16 % of trips had a destination in other European countries and 8 % outside Europe.

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

	2012	2011	2010	2009	2008
Switzerland	6 653	5 779	6 584	6 730	8 922
Germany	2 857	1 722	1 911	2 011	2 776
Austria	847	839	763	942	825
Italy	1 913	1 905	2 060	1 738	1 691
France ¹	2 023	1 625	1 267	1 764	1 870
Southeast Europe ²	721	837	864	801	688
Southwest Europe ³	935	911	860	721	890
Rest of Europe	1 316	1 361	1 000	1 239	1 123
Rest of the world	1 487	1 261	1 280	1 217	1 268
Unknown	0	4	7	20	16
Total	18 752	16 245	16 595	17 183	20 069

¹ Including overseas departments and Monaco

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

³ Spain, Portugal, Andorra, Gibraltar

DURATION AND PURPOSE OF TRAVEL

Trips with a destination abroad lasted longer than trips within Switzerland. In 2012, trips of 4 or more overnight stays represented 65 % of the outbound and only 35 % of the inbound trips. On the other hand, trips with only one overnight stay accounted for 30 % of domestic and 9 % of trips abroad. In 2012, the main reasons for trips were, as in the previous years, holidays and recreation. They accounted for 64 % of trips, and almost two-thirds of these had a foreign destination. In second place came trips for the purpose of visiting family and friends (17 %). Business trips accounted for 10 % of trips, mostly with a destination abroad.

Source: Swiss Federal Statistical Office, Survey of travel behaviour 2012

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 2013, the Swiss hotel industry recorded a total of 35.6 million overnight stays which was 2.5 % more than in the previous year. Swiss demand amounted to 15.9 million overnight stays, which corresponds to an increase of 1.3 % compared with 2012. Foreign guests generated 19.7 million overnight stays, i.e. a rise of 3.5 %. Germany accounted for the strongest foreign demand with 4.6 million overnight stays (–1.1 % compared with 2012), followed by the United Kingdom and the United States with 1.6 million overnight stays each (+6.2 % / +4.0 %). In terms of tourist regions, the Zurich region recorded the highest number of overnight stays in 2013 with 5.5 million units (+2.8 %). It was followed by Graubünden with 5.2 million overnight stays (+1.9 %) and Valais with 3.9 million overnight stays (–2.5 %). In 2013, visitors stayed an average of 2.1 nights in Switzerland. For guests from within Switzerland the average length of stay was 2.0 nights while for those from abroad it was 2.2 nights. Among the tourist regions, Graubünden recorded the longest average stay with 2.9 nights.

DEVELOPMENT OF OVERNIGHT STAYS 2013

MONTHLY OVERNIGHT STAYS AND CHANGE IN % COMPARED TO THE SAME PERIOD OF 2012

	Overnight stays Total	Change in %	Overnight stays foreigners	Change in %	Overnight stays Swiss	Change in %
January	2 735 819	–1.0	1 428 596	–1.7	1 307 223	–0.2
February	3 038 542	–1.4	1 529 619	–2.5	1 508 923	–0.1
March	3 213 051	4.9	1 752 011	5.4	1 461 040	4.3
April	2 278 513	–0.6	1 299 125	–0.2	979 388	–1.2
May	2 562 315	1.6	1 522 496	3.4	1 039 819	–1.0
June	3 274 533	4.2	1 957 282	5.9	1 317 251	1.8
July	4 031 410	4.6	2 281 682	4.2	1 749 728	5.1
August	4 164 567	7.6	2 426 353	10.2	1 738 214	4.1
September	3 326 707	1.0	1 806 611	2.6	1 520 096	–0.9
October	2 633 182	–0.4	1 357 803	2.4	1 275 379	–3.2
November	1 861 420	3.0	980 413	1.9	881 007	4.3
December	2 503 824	3.1	1 392 666	4.9	1 111 158	0.9
Entire year	35 623 883	2.5	19 734 657	3.5	15 889 226	1.3

Source: Swiss Federal Statistical Office, Statistics on tourist accommodation

OVERNIGHT STAYS BY COUNTRY OF RESIDENCE OF VISITORS

Country of residence of visitors	Calendar year 2013	Winter season 12/13 (November to April)	Summer season 2013 (Mai to October)
Total	35 623 883	15 501 740	19 992 714
Switzerland	15 889 226	7 202 593	8 640 487
Foreign countries	19 734 657	8 299 147	11 352 227
Europe total (excl. Switzerland)	13 257 669	6 233 090	6 980 518
Germany	4 573 496	2 091 278	2 484 918
United Kingdom ¹	1 640 091	763 738	861 108
France	1 350 164	667 254	673 627
Italy	980 646	463 350	516 463
Netherlands	709 937	333 057	375 534
Belgium	643 365	310 600	330 424
Russia	578 656	327 385	251 565
Nordic countries ²	509 409	255 650	254 631
Spain	427 310	180 941	250 253
Austria	387 467	159 399	228 221
Other countries Europe	1 457 128	680 438	753 774
America total	2 238 949	793 830	1 434 062
United States	1 585 467	533 728	1 042 217
Canada	230 189	82 428	146 378
Brazil	206 378	90 892	114 278
Other countries America	216 915	86 782	131 189
Asia total	3 635 911	1 039 744	2 570 816
China (incl. Hong Kong)	994 546	298 882	690 547
Gulf States ³	623 205	138 139	481 790
Japan	491 651	98 880	395 432
India	467 967	102 057	369 794
Republic of Korea	187 966	65 775	116 976
Other countries Asia	870 576	336 011	516 277
Africa total	293 649	135 115	159 619
Australia, Oceania total	308 479	97 368	207 212

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

Source: Swiss Federal Statistical Office, Statistics on tourist accommodation

**HOTEL INDUSTRY: SUPPLY AND DEMAND
CANTONS**

Canton	Capacity ¹		Overnight stays in thousands			Net occupancy rate in %	
	Rooms	Beds	Swiss	Foreigners	Total	Rooms ²	Beds ³
Graubünden	18 819	39 083	2 904	2 257	5 161	49.8	41.0
Bern	16 845	32 747	2 267	2 653	4 920	52.1	44.0
Zurich	14 029	24 387	1 272	3 437	4 709	65.0	53.2
Valais	13 959	28 958	2 020	1 867	3 888	48.6	41.0
Geneva	9 188	15 152	554	2 329	2 883	63.8	52.3
Vaud	9 159	17 351	1 080	1 523	2 603	54.0	42.5
Ticino	8 653	17 095	1 437	968	2 405	47.1	39.8
Lucerne	6 241	11 694	674	1 155	1 829	52.4	43.9
Basel-Stadt	3 782	6 487	323	783	1 106	61.9	47.1
St. Gallen	5 037	9 688	567	456	1 024	38.1	30.2
Aargau	3 164	5 267	353	345	699	47.6	37.3
Schwyz	2 289	4 426	387	218	605	42.2	38.6
Obwalden	2 178	4 314	253	352	605	47.7	40.5
Fribourg	2 118	4 353	294	180	473	41.4	30.8
Thurgau	2 116	3 704	255	166	421	41.1	31.9
Solothurn	1 603	2 798	195	189	384	47.7	38.4
Zug	1 292	2 094	142	165	307	53.1	41.0
Basel-Landschaft	1 348	2 479	140	145	285	44.4	32.1
Neuchâtel	1 228	2 368	126	113	239	40.0	28.9
Uri	1 199	2 536	80	147	228	36.4	27.3
Nidwalden	776	1 658	87	116	203	45.0	34.7
Appenzell Innerrhoden	618	1 902	135	25	160	44.5	26.5
Schaffhausen	576	1 096	60	69	129	44.1	33.4
Glarus	720	1 570	105	22	127	29.5	24.2
Appenzell Ausserrhoden	854	1 526	90	34	124	29.8	23.3
Jura	860	1 755	88	19	107	24.0	17.9
Total	128 648	246 489	15 889	19 735	35 624	51.6	41.9

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

Source: Swiss Federal Statistical Office, Statistics on tourist accommodation

TOURIST REGIONS

Tourist regions	Capacity ¹		Overnight stays in thousands			Net occupancy rate in %	
	Rooms	Beds	Swiss	Foreigners	Total	Rooms ²	Beds ³
Zurich Region	17 379	29 981	1 654	3 824	5 478	62.0	50.5
Graubünden	18 819	39 083	2 904	2 257	5 161	49.8	41.0
Valais	13 959	28 958	2 020	1 867	3 888	48.6	41.0
Bernese Oberland	11 672	23 464	1 587	2 062	3 649	53.3	46.2
Lucerne/Lake Lucerne	12 481	24 316	1 445	1 969	3 414	47.7	40.0
Geneva	9 188	15 152	554	2 329	2 883	63.8	52.3
Lake Geneva Region (Vaud)	9 159	17 351	1 080	1 523	2 603	54.0	42.5
Ticino	8 653	17 095	1 437	968	2 405	47.1	39.8
Eastern Switzerland	9 662	18 999	1 188	745	1 933	38.0	29.3
Basel Region	5 759	10 052	521	967	1 488	54.9	41.2
Bern Region	5 743	10 056	753	731	1 484	52.4	41.6
Jura & Three-Lakes	4 056	7 628	452	313	764	38.5	28.7
Fribourg Region	2 118	4 353	294	180	473	41.4	30.8
Total	128 648	246 489	15 889	19 735	35 624	51.6	41.9

COMMUNES

Communes	Capacity ¹		Overnight stays in thousands			Net occupancy rate in %	
	Rooms	Beds	Swiss	Foreigners	Total	Rooms ²	Beds ³
Zurich	7 842	13 797	586	2 244	2 830	69.1	56.3
Geneva	6 381	10 457	301	1 746	2 046	65.0	53.8
Zermatt	3 228	6 353	532	725	1 257	67.6	60.6
Lucerne	2 975	5 610	313	863	1 176	67.6	57.7
Basel	3 681	6 300	315	778	1 094	63.0	47.9
Davos	2 981	5 823	401	425	826	53.6	45.6
Lausanne	2 255	4 028	298	453	751	66.2	51.3
Bern	2 097	3 546	338	374	712	66.0	55.3
Interlaken	1 589	3 050	156	542	698	68.2	63.2
St. Moritz	2 170	4 128	216	463	679	59.1	51.4
Opfikon	1 422	2 506	138	401	539	71.4	58.9
Grindelwald	1 356	2 874	169	345	514	61.6	55.3
Lugano	1 647	3 120	207	306	513	54.5	45.7
Montreux	1 344	2 391	168	281	449	58.3	51.8
Lauterbrunnen	1 306	2 604	124	325	449	60.0	53.9
Total	128 648	246 489	15 889	19 735	35 624	51.6	41.9

SUPPLY IN HOTELS AND HEALTH ESTABLISHMENTS

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

DEMAND IN HOTELS AND HEALTH ESTABLISHMENTS

Year	Arrivals	Overnight stays	Average duration of stay	Net occupancy rate in % (rooms) ¹	Net occupancy rate in % (beds) ²
2013	16 831 177	35 623 883	2.1	51.6	41.9
2012	16 297 767	34 766 273	2.1	50.5	40.8
2011	16 228 987	35 486 256	2.2	51.6	41.9
2010	16 202 574	36 207 812	2.2	52.3	42.9
2009	15 564 494	35 588 893	2.3	51.7	42.6
2008	15 997 377	37 333 769	2.3	54.4	44.5

SIZE OF HOTELS AND HEALTH ESTABLISHMENTS

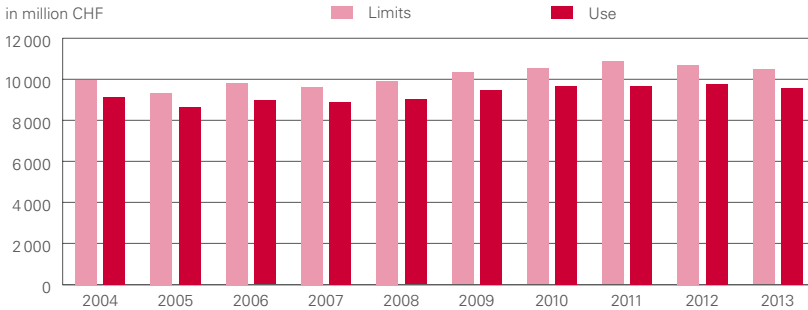
Size of establishment	Open establishments	in %	Arrivals	Overnight stays
0 to 10 beds	709	15.2	162 698	373 844
11 to 20 beds	1021	21.9	644 765	1 397 333
21 to 50 beds	1 554	33.3	3 008 921	6 624 315
51 to 100 beds	857	18.4	4 379 261	9 604 634
101 to 150 beds	261	5.6	2 681 683	5 617 461
151 to 200 beds	106	2.3	1 419 566	3 093 567
201 to 300 beds	90	1.9	2 058 711	4 247 489
301 and more beds	64	1.4	2 475 572	4 665 240
Total	4 662	100.0	16 831 177	35 623 883

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

Source: Swiss Federal Statistical Office, Statistics on tourist accommodation

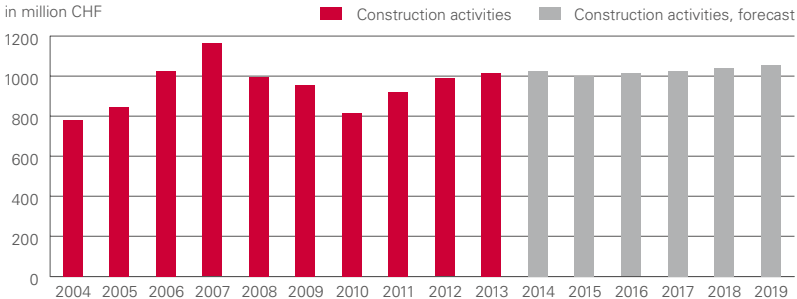
The surge in investments in hotel construction, which started in 2011, continued even in the challenging economic environment of 2013. With investments totalling more than CHF 1 billion, hotel and restaurant construction increased by about 3 % compared to the prior year, almost reaching the pre-crisis level of 2006 and 2007. Uncertainties caused by difficult political conditions, such as the people's vote in favour of the mass immigration initiative and the implementation of the initiative on second homes have a slightly inhibiting effect on investments. It is anticipated that construction activities will stabilize at a level of approximately CHF 1 billion in the next few years.

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, Building Construction Forecast 2013–2019

FACTS AND FIGURES FROM PROFESSIONAL DISCUSSION FORUMS (2012)

For 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 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 2012

Hotel category (in %) Number of hotels	3 stars 57	4 stars 82	5 stars 29
Income from accommodation	55.5	50.5	51.1
Income from restaurants	39.7	40.6	37.2
Other income	4.8	8.9	11.6
Total income	100.0	100.0	100.0
Gross operating income (GOI) accommodation	56.7	58.9	64.3
Gross operating income (GOI) restaurants	18.0	11.8	3.3
Direct cost of goods	13.9	14.4	12.9
Direct staff costs	37.6	38.0	39.6
Direct operating expenses	6.3	6.2	7.9
Gross operating income (GOI)	42.3	41.3	39.6
Administrative expenses (including staff costs)	8.4	8.6	8.6
Marketing expenses (including staff costs)	2.4	3.9	5.4
Maintenance costs (including staff costs)	5.1	5.7	6.8
Energy costs (including staff costs)	3.1	4.1	3.7
Other expenses	0.1	0.4	0.1
Gross operating profit (GOP)	23.2	18.7	15.0

Key figures

Number of rooms	51.1	76.9	133.0
Average room occupancy in persons	1.49	1.56	1.59
Average stay in days	2.29	2.54	2.98
Revenue per room in CHF	35 073	47 748	91 829
Return on food sales in %	60.7	67.5	68.6
Return on beverages sales in %	67.6	72.2	75.3
F & B return in %	63.3	69.1	70.7
Total sales in CHF	3 585 647	7 676 306	24 189 307

Source: hotelleriesuisse

ROOM AVERAGE (IN CHF)

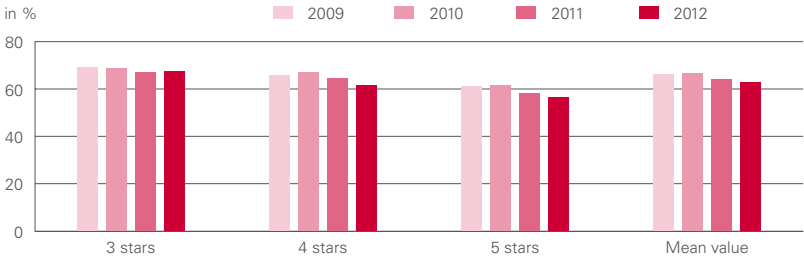
The room average indicates the average revenue per room.

Hotel category	3 stars	4 stars	5 stars	Mean value
2012	153.20	238.65	527.74	259.56
2011	157.04	239.41	545.96	261.50
2010	162.15	231.20	533.40	260.76
2009	156.55	232.40	550.90	261.80

Source: hotelleriesuisse

OCCUPANCY RATE

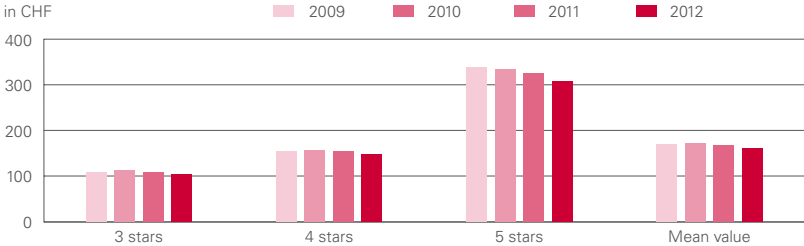
Occupancy rate based on available days indicates how often a room was occupied on the days on which it was available.



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 ¹

HOLIDAY APARTMENTS

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, tourist 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.

Total annual overnights from holiday apartments in Switzerland are estimated to be approx. 18 million (basis: last FSO survey 2003). In 2013, more than 74 000 holiday apartments in Switzerland generated around 5 580 000 overnights. Average duration of occupancy of the apartments is approx. 63 days.

CHANGE IN OVERNIGHT STAYS FROM 2012 TO 2013	in %
Graubünden	– 6.9
Eastern Switzerland/Liechtenstein	– 9.4
Zurich Region	– 6.8
Lucerne/Lake Lucerne	– 6.2
Basel Region	– 3.8
Bern Region	– 26.9
Bernese Oberland	– 11.8
Jura & Three-Lakes	+ 18.9
Lake Geneva Region	– 0.7
Geneva	+ 51.2
Valais	+ 12.5
Ticino	– 9.1
Fribourg Region	– 3.5

GUESTS' COUNTRY OF ORIGIN	in %
Switzerland	63.5
Germany	15.2
Netherlands	4.8
France	3.2
Great Britain	2.8
Belgium	2.3
Russia (Russian Federation)	1.0
Other Europe	3.7
Rest of the world	3.5

Rest of the world – in detail	in %
United States	23.3
Saudi Arabia	18.2
India	11.6
Israel	6.7
Kuwait	5.6
Japan	5.1
Australia	4.2
United Arab Emirates	4.2
Other countries	21.1

¹ Non-hotel accommodation
Source: Swiss Tourism Federation

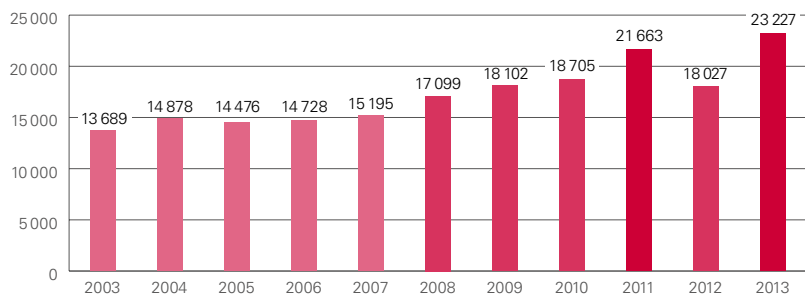
CLASSIFIED HOLIDAY APARTMENTS & GUEST ROOMS

HOLIDAY APARTMENTS BY REGIONS

Tourist region	 *****	 ****	 ***	 **	 *						Total
Basel Region	0	0	0	1	0	1	0	0	0	0	2
Bern Region	1	0	0	5	1	23	0	11	0	2	43
Bernese Oberland	0	61	11	498	128	1 617	220	257	69	0	2 861
Fribourg Region	0	1	0	12	15	77	16	20	3	0	144
Geneva	0	0	0	5	0	2	0	0	0	0	7
Lake Geneva Region	0	44	12	134	59	324	62	82	10	3	730
Graubünden	3	136	44	959	365	3 597	427	568	76	11	6 186
Jura & Three-Lakes	0	4	3	28	43	207	62	59	15	1	422
Lucerne/Lake Lucerne	0	9	17	101	34	616	79	118	16	2	992
Eastern Switzerland/Liechtenstein	0	1	2	110	23	299	57	62	18	1	573
Ticino	5	14	9	169	51	818	82	130	31	7	1 316
Valais	14	356	53	1 779	470	5 656	402	1 006	84	27	9 847
Zurich Region	0	0	0	10	1	89	0	4	0	0	104
Total	23	626	151	3 811	1 190	13 326	1 407	2 317	322	54	23 227¹

¹ Of these, 305 objects are guest rooms.

AWARDED CERTIFICATES 2002–2013



For more information on the classification of holiday apartments and guest rooms, please go to page 58 of this brochure.
Source: Swiss Tourism Federation

GROUP LODGINGS

CONTACT groups.ch is the private umbrella organisation for group accommodations in Switzerland. In 2013, it provided 1.96 million overnight stays (–10 %) for 14,714 groups at a total of 742 accommodations. The overnight figures of the group accommodations are declining for the third year in a row. The demand in this price-sensitive segment still suffered heavily from the exchange rate conditions and the EURO crisis. In particular, demand from Germany, the main foreign source market, collapsed again in 2013 by 15 % (–10 % in the previous year). For group accommodations, this is a new phenomenon, as they could always proudly boast growth rates in the past and were able to benefit from austerity measures of the organisers in times of crisis (booking a lower comfort level). It was possible to keep the length of stay in the group accommodations at a high level of 4.8 nights and to claim the group size in the long-term trend of 28 people.

SUPPLY AND DEMAND ¹

Tourist region	Establish-ments	Beds	Groups	Arrivals	Overnight stays	Duration of stay	Group size
Basel Region	5	314	83	1 882	6 116	3.1	22
Bern Region	14	952	238	6 133	21 630	3.4	26
Bernese Oberland	130	8 697	2 270	60 341	286 885	4.6	26
Fribourg Region	20	1 315	588	20 466	83 809	4	34
Lake Geneva Region (Vaud)	40	2 689	988	30 281	116 773	3.7	30
Graubünden	141	9 744	2 235	64 349	358 650	5.4	29
Jura & Three-Lakes	46	2 578	1 204	35 450	142 373	3.9	29
Lucerne/Lake Lucerne	67	4 179	1 582	48 697	212 936	4.2	30
Eastern Switzerland/Liechtenstein	64	4 384	1 651	45 050	214 216	4.6	27
Ticino	26	972	812	16 090	83 572	5	20
Valais	179	11 596	2 871	74 375	415 489	5.4	26
Zurich Region	10	636	192	5 444	17 922	3.2	28
Total	742	48 056	14 714	408 558	1 960 371	4.8	28

Guests' Country of Origin	Groups	Arrivals	Overnight stays	Duration of stay	Group size
Switzerland	11 715	337 598	1 521 022	4.5	29
Germany	1439	32 322	230 220	7.1	22
France	307	7 097	29 581	4.2	23
Others	1 253	31 541	179 548	7.1	23
Total	14 714	408 558	1 960 371	4.8	28

¹ The methodology has been adapted for the participation in PASTA light. The figures are therefore not strictly comparable with previous years. Source: CONTACT groups.ch

YOUTH HOSTELS

In 2013, youth hostels based in Switzerland recorded a total of 947 000 overnight stays or 3.3 % more than during the previous year. Domestic demand was at 548 000 overnight stays, which corresponds to an increase of 2.2 %. Foreign demand generated 399 000 overnight stays or 5.0 % more. German guests accounted for the largest share of foreign demand with 105 000 overnight stays (+3.3 % compared with 2012), followed by guests from the United Kingdom with 33 000 overnight stays (+24.1 %) and from France with 29,000 overnight stays (+3.2 %). In terms of tourist regions, Graubünden recorded the largest number of overnight stays with 147 000 units (which corresponds to a rise of 3.2 % compared with 2012), followed by the Zurich region with 123 000 overnight stays (+2.7 %) and Ticino with 100 000 overnight stays (+3.8 %). In 2013, the average duration of stay in the youth hostels was 2 nights at national level. Swiss guests stayed an average of 2.0 nights whereas foreign visitors stayed an average of 1.9 nights. In terms of tourist regions, the longest length of stay was registered in Graubünden with a result of 2.6 nights.

SUPPLY AND DEMAND

Tourist Region	Surveyed establishments	Surveyed beds	Arrivals	Overnight stays	Average duration of stay
Graubünden	8	1 030	55 838	147 404	2.6
Eastern Switzerland	5	464	28 851	50 463	1.7
Zurich Region	7	735	62 494	123 070	2.0
Lucerne/Lake Lucerne	5	507	41 917	71 902	1.7
Basel Region	2	285	x	x	x
Bern Region	3	288	30 894	50 031	1.6
Bernese Oberland	5	546	43 868	81 455	1.9
Jura & Three-Lakes	3	266	x	x	x
Lake Geneva Region (Vaud)	4	550	42 237	88 741	2.1
Geneva	1	334	x	x	x
Valais	3	341	25 952	49 046	1.9
Ticino	4	596	48 012	99 570	2.1
Fribourg Region	1	76	x	x	x
Total	51	6 018	479 773	947 331	2.0

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

Source: Swiss Federal Statistical Office, Statistics on tourist accommodation

CAMPSITES¹

In 2013, the campsites recorded 2,9 million overnight stays representing a decrease of 3.4 % compared with the previous year. Swiss guests accounted for 1.7 million overnight stays, down 3.6 %. Foreign guests generated 1.2 million overnight stays, down 3.1 %. German guests accounted for 435 000 overnight stays (–4.7 % compared with 2012), which corresponds to the highest absolute result among the foreign countries. They were followed by visitors from the Netherlands with 317 000 overnight stays (–3.4 %), France with 88 000 overnight stays (+5.2 %) and the United Kingdom with 67 000 (+4.6 %). With a total of 723 000 overnight stays for 2013, Ticino ranks first among all tourist regions in terms of absolute overnight stays but, however, saw a 6.5 % decrease compared with the previous year. It was followed by Valais with 406 000 overnight stays (–1.3 %). For Switzerland as a whole, the average length of stay was 3.2 nights in 2013. Swiss guests spent an average of 3.4 nights on campsites while foreign guests stayed 2.9 nights. Of all tourist regions, Ticino recorded the longest average length of stay with 4.2 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	5 365	3 693	1 672	83 754	278 028	3.3
Eastern Switzerland	38	4 781	1 844	2 937	63 782	163 611	2.6
Zurich Region	28	3 403	1 405	1 998	49 238	122 195	2.5
Lucerne/Lake Lucerne	40	5 512	2 548	2 964	105 352	260 852	2.5
Basel Region	10	802	252	550	10 019	23 574	2.4
Bern Region	10	1 245	872	373	29 787	66 220	2.2
Bernese Oberland	53	5 117	3 259	1 858	101 136	316 201	3.1
Jura & Three-Lakes	36	5 771	2 566	3 205	59 259	184 513	3.1
Lake Geneva Region (Vaud) and Geneva ²	45	7 979	3 553	4 416	82 780	269 757	3.3
Valais	65	7 987	6 192	1 795	111 449	405 918	3.6
Ticino	35	6 090	5 087	1 003	173 146	723 032	4.2
Fribourg Region	13	2 625	710	1 915	21 700	50 175	2.3
Total	418	56 666	31 980	24 685	891 402	2 864 076	3.2

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

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

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

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

Source: Swiss Federal Statistical Office, Statistics on tourist accommodation

AGRITOURISM

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

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

Tourist region ²	Overnight stays 'Swiss Holiday Farms'	Overnight stays 'Sleep in Straw!'	Total 2013
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	6 832	30 397
Schweizer Mittelland	23 100	3 583	26 683
Western Switzerland ³	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
Total	91 066	34 389	125 455
Number of establishments	162	151	313

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

² Old FSO definition of regions

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

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

BED AND BREAKFAST

In the year 2013, a total of 186 478 guests stayed in 1 036 accommodations in Switzerland (2012: 179 792 guests in 988 accommodations). In total, 445 401 overnight stays were recorded (2012: 441 061 overnight stays). Domestic guests accounted for 218 123 nights (2012: 206 338), while Europe (Switzerland excluded) had the second largest share of overnight stays with 188 325 (2012: 193 040).

Please note: These afore mentioned results are not comparable with those of previous years, because the number of hosts varies each year; however, figures show an increase in overnight stays (2011/12: +10 %, 2012/13: +1 %), while the average length of stay decreased to 2.4 nights (2012: 2.5 nights).

SUPPLY AND DEMAND

Year	Establishments ¹	Rooms	Beds	Arrivals	Overnight stays Swiss	Overnight stays foreigners	Overnight stays total
2013	1 036	3 031	6 239	186 478	218 123	227 278	445 401
2012	988	2 903	5 965	179 792	206 338	234 723	441 061
2011	912	2 662	5 528	170 760	189 421	215 177	404 598
2010	933	2 717	5 602	157 060	168 711	200 151	368 862

Tourist region	Overnight stays 2013	Overnight stays 2012	Change in %
Valais	53 941	56 275	- 4.15
Lucerne/ Lake Lucerne	49 061	45 718	7.31
Lake Geneva Region (Vaud)	47 097	48 290	- 2.47
Bernese Oberland	45 514	57 367	- 20.66
Zurich Region	41 621	44 653	- 6.79
Bern Region	40 777	31 958	27.60
Ticino	37 101	34 031	9.02
Eastern Switzerland	32 969	37 709	- 12.57
Jura & Three-Lakes	27 558	20 184	36.53
Graubünden	26 806	21 927	22.25
Fribourg Region	20 677	17 344	19.22
Basel Region	18 721	22 913	- 18.30
Geneva	3 558	2 692	32.17
Total	445 401	441 061	0.98

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

Source: Bed and Breakfast Switzerland

HOTEL AND RESTAURANT INDUSTRY

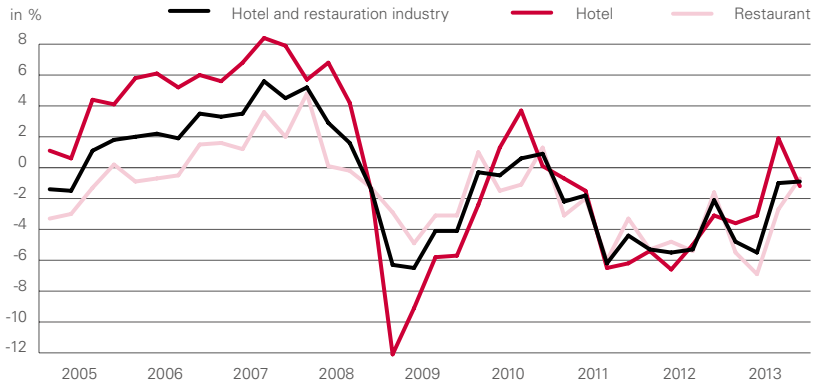
MAJOR EMPLOYER IN SWITZERLAND

208 077	employees (2013)
9 081	trainees in basic vocational education and training (2012)
32 000	hotel and restaurant establishments (2011)
28.2	billion francs of VAT-taxable annual turnover in catering business and hotels (2012)
932.5	million francs paid in VAT (after pre-tax deduction) (2012)
	or
9.1	% of the overall net Federal Tax Administration (FTA) receivables (2012)

Switzerland’s hotel and restaurant industry, with its 208 077 employees, is a very important employer in Switzerland. Some 4 % of the country’s employees work in the hotel and restaurant industry. In addition, this industry employs some 9 081 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 (2011) counts some 32 000 hotel and restaurant establishments in Switzerland. Of these, 66 % are restaurants, 19 % hotels, 10.7 % bars, pubs, night clubs or discos and 4.3 % snack stands and take-away establishments. The hotel and catering industry generated a VAT-taxable annual turnover of around CHF 28.2 billion. The hotel and restaurant industry makes a substantial contribution to VAT revenues. In 2012, it paid the net sum of CHF 932.5 million in VAT. The approximately 26 805 restaurants and hotels in 2012 liable for tax thus contributed 9.1 % of the overall Federal Tax Administration (FTA).

Source: GastroSuisse, Industry Report 2014

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

1st quarter	-4.8 %	3rd quarter	-1.0 %
2nd quarter	-5.5 %	4th quarter	-0.9 %

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

For the year 2013, a significant slowdown of the downwards trend is to be reported. While there was still a decrease of around 5 % on average in the first two quarters of 2013, the situation improved in the subsequent months. With a decline in turnover of about one percent in the last two quarters of 2013, the negative development in relation to the previous year was decelerated.

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

1st quarter	-5.5 %	3rd quarter	-2.7 %
2nd quarter	-6.9 %	4th quarter	-0.7 %

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

The turnover situation in the restaurant segment did not ease as significantly as it did in the accommodation segment. In the first two quarters of 2013, the decrease in turnover was even greater than in the same period of the previous year. Here too, however, the downwards trend slowed in the remainder of the year. The decrease in turnover fell by around 50 % in comparison with the previous year. For the first quarter of 2014, a continuing upwards trend is evident.

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

1st quarter	-3.6 %	3rd quarter	+1.9 %
2nd quarter	-3.1 %	4th quarter	-1.2 %

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

On the whole, the average decrease in accommodation turnover for the year 2013 was 1.5 %. However, the loss of turnover was more than three times smaller than in the previous year. There was even an increase in turnover of almost 2 % realised in the 3rd quarter of 2013. Throughout the whole year, not only did the demand from abroad increase, but once again more Swiss guests booked overnight stays as well. Also in January 2014, the signs still point to growth.

TURNOVER PER ESTABLISHMENT



Source: GastroSuisse, Industry Report 2014

The type of establishment has a major effect on the generated turnover. For instance, the proportion of hotel establishments with annual turnover of up to CHF 150 000 in 2013 (5.1 %) is significantly smaller than the proportion of restaurant establishments in the same category (12.4 %). This is due to the fact that a night’s accommodation with breakfast not only requires more personnel than a restaurant service, but also the other cost items are higher in comparison. In both the restaurant and hotel segments, a good third of the establishments were among the lower-middle tier of the turnover categories (CHF 350 001 to 850 000 per annum). On the other hand, the proportion of hotel establishments in the higher turnover categories is considerably larger than the corresponding proportion of restaurant establishments.

AN OVERVIEW OF IMPORTANT KEY RATIOS FOR THE RESTAURANT INDUSTRY 2012

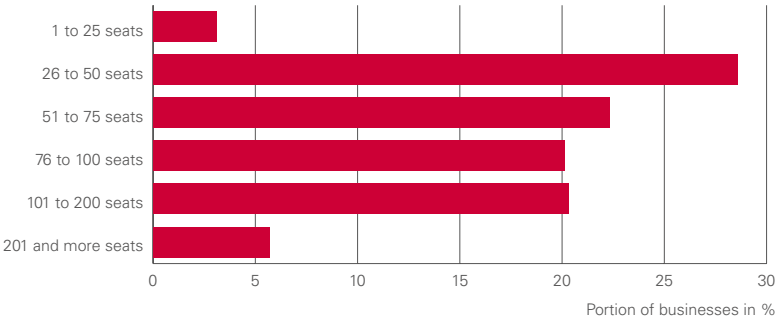
Total turnover per operating day	2 785 CHF
Total turnover per employee	109 268 CHF
Total turnover per employee and operating day	440 CHF
Turnover per restaurant per seat	9 211 CHF
Turnover per restaurant per seat and operating day	37 CHF
Turnover from food preparation per seat	5 141 CHF
Turnover from food preparation per seat and operating day	21 CHF

Source: GastroSuisse, Industry Report 2014

In restaurants, the turnover generated per person employed was on average CHF 109 268; and in hotels with a restaurant the corresponding amount was only slightly higher at CHF 112 260. Total turnover per operating day in restaurants was on average CHF 2 785, and in hotels with a restaurant CHF 4 545. Turnover per seat in a restaurant totalled CHF 9 211 or CHF 21 per day of operation.

For more information, check the publication from GastroSuisse ‘Branchenspiegel 2014’ (‘Industry Report 2014’), available from GastroSuisse (phone: 0848 377 111) for CHF 35.

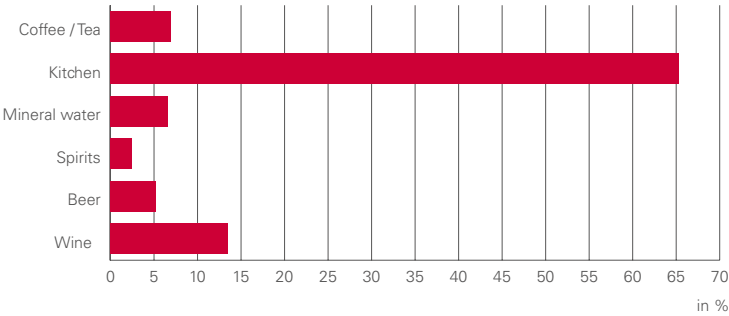
**BUSINESS SIZE:
NUMBER OF SEATS PER RESTAURANT**



Source: GastroSuisse, Industry Report 2014

TURNOVER MIX

In 2012, 65.3 % of an average restaurant’s turnover was generated from food orders. Alcoholic drinks were in second place, generating 21.2 % of turnover, whereas 13.5 % of turnover resulted from the sale of mineral water, coffee and tea. Compared to the previous year, the proportion of total turnover attributed to cuisine decreased by 2.5 percentage points. On the other hand, the proportion attributed to wine increased by 3.5 percentage points.



Source: GastroSuisse, Industry Report 2014

OUTGOING

MOST POPULAR TRAVEL DESTINATIONS OF THE SWISS POPULATION

EUROPE	Incoming travellers from Switzerland			Overnight stays			
	2012	2011	+/- in %	2012	2011	+/- in %	Ø nights
France	6 100 000	5 700 000	7.2	32 700 000	29 100 000	12.6	5.4
Germany	2 489 593	2 301 482	8.2	5 210 806	4 764 553	9.4	4.7
Italy	2 146 388 ¹	1 994 976	7.6	8 708 092 ¹	8 145 329	6.9	4.0
Spain	1 448 941	1 373 483	6.0	3 298 715 ¹	3 111 995	6.0 ¹	9.2
Austria	1 275 578	1 198 957	6.4	4 557 826	4 276 846	6.6	3.6
Great Britain	832 000	768 000	8.3	4 094 000	4 318 000	-5.4	4.9
Turkey	354 461	328 825	7.8	1 701 413 ¹	1 578 360	7.8	4.8 ¹
Greece	299 619	361 405	-17.1	3 127 300	3 698 000	-15.4	10.4
Netherlands	219 355 ¹	201 243	9.0 ¹	450 542 ¹	425 040	6.0 ¹	2.1
Croatia	176 064	147 248	9.0	730 374	684 933	10.0	4.1

NORTH & SOUTH AMERICA

USA	476 637	476 502	0.0	8 579 466 ¹	9 291 789	-8.2	18.0 ¹
Canada	111 830	112 241	-0.4	1 809 000	1 755 592	2.9	16.2
Brazil	69 571	65 951	5.5	1 321 849	1 582 824	-16.6	19.0
Mexico	31 329	29 550	6.0	407 277 ¹	384 150 ¹	6.0	13.0 ¹
Dominican Republic	27 815	26 522	4.9	236 427	236 311	0.0	8.5

ASIA / OCEANIA

Thailand	190 784	180 720	12.2	3 052 544 ¹	2 909 592 ¹	4.7	16.0 ¹
Singapore	85 661 ¹	79 023	8.4	256 983 ¹	238 643	7.7	3.0
China	83 000	75 000	11.0	332 000 ¹	301 200 ¹	10.2	4.0
Dubai	56 335	50 557	11.4	262 808	213 390	23.2	4.4
Hong Kong	52 141	51 170	1.9	208 564 ¹	204 680 ¹	1.9	4.0

AFRICA

Egypt	155 845	140 148	11.2	1 829 690	1 656 156	10.3	11.7
Marocco	61 934	67 615	-8.4	128 346	125 646	2.1	7.0
Tunisia	59 578	42 486	40.2	297 890 ¹	220 927 ¹	34.8	5.0 ¹
South Africa	51 807	40 728	27.2	880 719 ¹	733 104 ¹	20.1	17.0 ¹
Mauritius	26 002	24 362	6.7	338 026 ¹	328 887 ¹	2.8	13.0 ¹

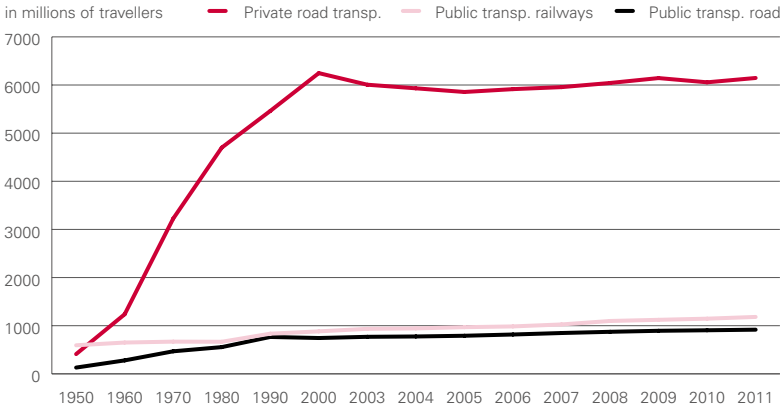
¹ Estimated i.e. extrapolated; no responsibility taken for this information.
Source: TRAVEL INSIDE

TOURISM INFRASTRUCTURE

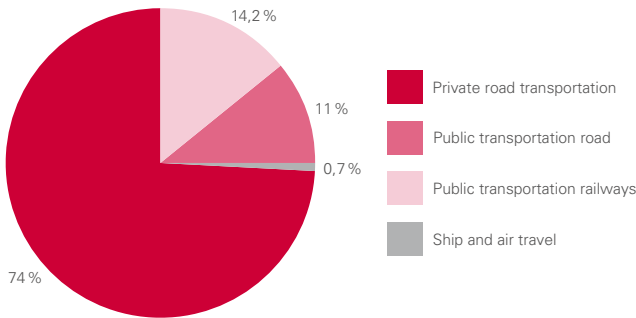
TRANSPORT

PASSENGER TRANSPORTATION

NUMBER OF PASSENGERS PER CARRIER 1950–2011



NUMBER OF PASSENGERS PER CARRIER 2011
IN % OF TOTAL TRANSPORTS



Source: LITRA, Public transport information service

PUBLIC TRANSPORT

The public transport route network on railways, roads, lakes and rivers adds up to a total of 27 386 kilometres. 28 298 stopping points are served. In 2013, 2.35 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 ₂
Regional rail traffic	11 grams CO ₂
Motor coach	53 grams CO ₂
Regional bus	107 grams CO ₂
Passenger car	194 grams CO ₂

Source: Public Transport Association

ONE OF THE DENSEST RAILWAY NETWORKS IN THE WORLD

The railroad network of Switzerland totals 5 232 kilometres. 2 992 kilometres are part of the Swiss Federal Railways network. From Monday to Friday, the Swiss railways (SBB) operate around 8 100 passenger trains or 392 000 train kilometres on their route network. Around half of this consists of long-distance services (Eurocity, Intercity and express trains), the other half of regional and suburban railway services. In 2013, Swiss Federal Railways carried 366 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 2012, 118 transport companies transported guests by tram, trolley bus and bus on a 19 480 kilometre-long network (figures include PostBus). Around 15 800 employees were necessary in order to transport the approximately 1.45 billion passengers with buses and trams.

The 848 PostBus routes operate a network of more than 11 500 kilometres. 1 946 PostBus Switzerland Ltd. employees, with an additional 1 611 drivers from PostBus operators, conveyed almost 140 million passengers with 2 219 Postbuses. The vehicles covered an overall distance of 108 million kilometers.

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

NAVIGATION: ACTIVE LAKE AND RIVER CRUISING IN SWITZERLAND

In 2013 the 16 companies joined together in the Association of Swiss Navigation Companies (ASNC) transported a total of 11.9 million passengers with 147 boats. Due to the wet spring and fall, this is about 7 % less than in 2012 with 12.81 million passengers.

Lake Lucerne once again topped the list with 2.2 million passengers, followed by Lake Geneva with 2.18 million passengers, the Lake Zurich Horgen–Meilen ferry with 2.03 million passengers and Lake Zurich (incl. Limmat River) with 1.69 million passengers.

In distance travelled, the performance declined slightly from 2.44 to 2.42 million kilometres. Inland waterway transportation covers a network of approximately 1 545 kilometres.

Source: LITRA, Public transport information service

AIR TRAFFIC: OVER 45 MILLION AIR PASSENGERS

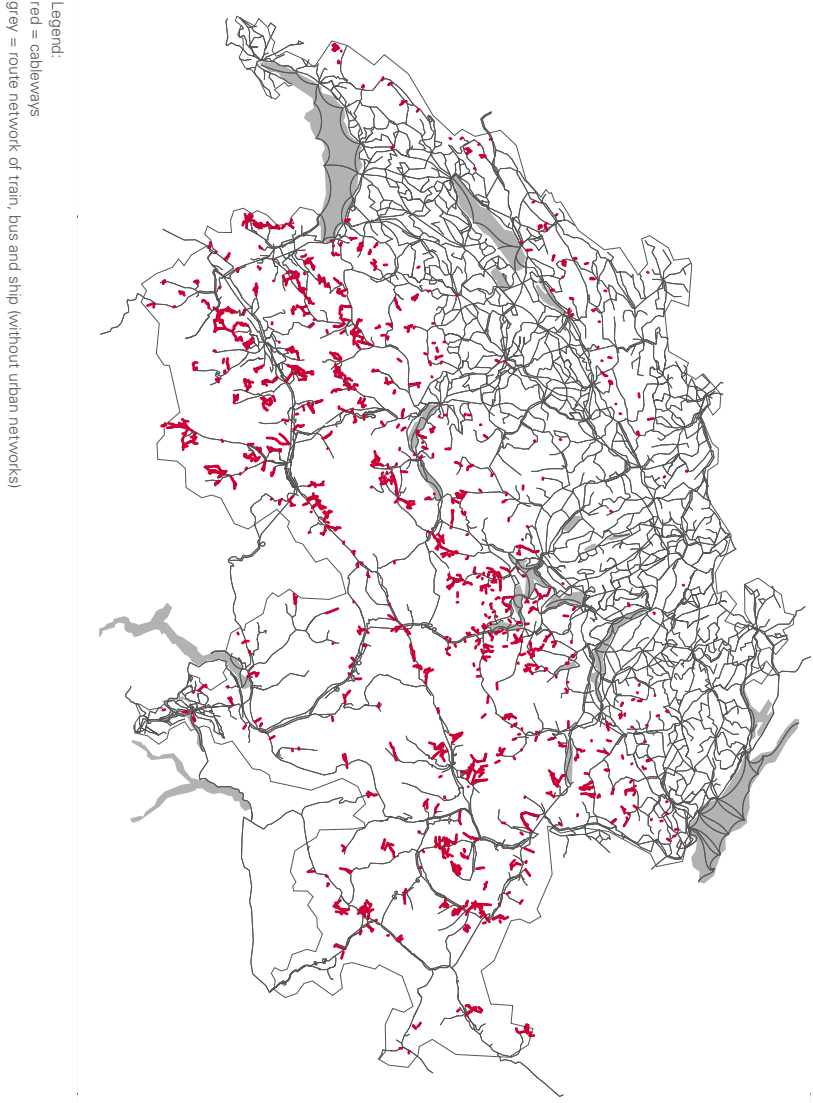
In 2013, Switzerland's airports recorded some 447 737 flight movements (take-offs and landings, only schedule and charter flights), 1.7 % less than in 2012. Of the 45.6 million passengers taking off from or landing in Switzerland, about 130 021 used Switzerland as a transit station.

FLIGHT MOVEMENTS AND PASSENGERS

Airport	Movements	Local and transfer passengers	Transit passengers	Total passengers
Basel Mulhouse	63 094	5 843 927	15 820	5 859 747
Bern Belp	10 559	244 699	2 347	247 046
Genève Cointrin	138 503	14 328 107	31 794	14 359 901
Lugano Agno	4 830	142 570	0	142 570
Sion	446	2 591	0	2 591
St. Gallen Altenrhein	1 991	85 960	0	85 960
Zurich Kloten	228 314	24 853 679	80 060	24 933 739
Total	447 737	45 501 533	130 021	45 631 554

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

OVERVIEW OF PUBLIC TRANSPORT AND CABLEWAYS



Source : Public Transport Association, Swiss 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 Mai 2013 there were 1 694 licensed facilities in Switzerland (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 3 560 full-time employees and over 6 600 seasonal workers in transport operations alone.
- In its core business of passenger transport, Swiss mountain railways achieved in the 2012/13 winter season the sum of CHF 756 millions. Additional revenue of CHF 189 million was generated by the food service industry and other activities (e.g. rentals).
- The areas where visitors and locals can take advantage of the Swiss 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.

CHANGE IN WINTER REVENUE IN SWITZERLAND (IN 1000)

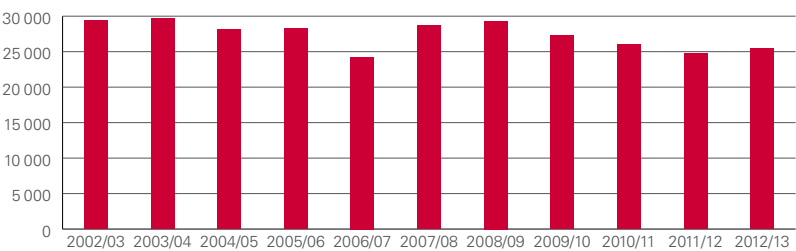


Source: Swiss cableways (SCW), Facts and Numbers in favour of Swiss Cableways Industry 2013; Laurent Vanat, season balance 2012/13

EVOLUTION OF SKIER-DAYS

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

EVOLUTION OF SKIER-DAYS IN SWITZERLAND (IN 1000)

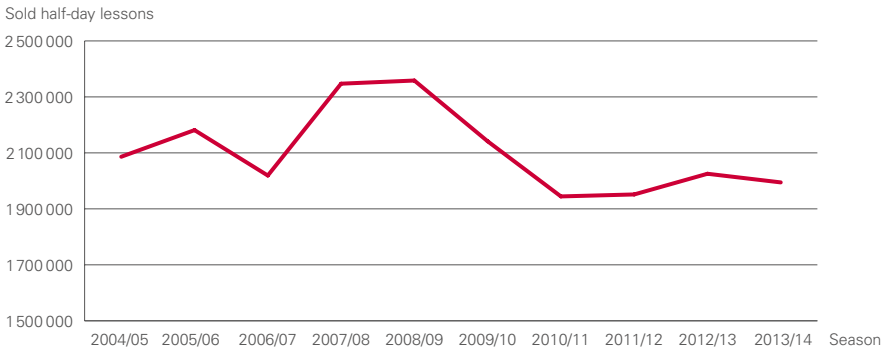


Source: Swiss cableways (SCW), Facts and Numbers in favour of Swiss Cableways Industry 2013; Laurent Vanat, season balance 2012/13

SWISS SKI SCHOOLS

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

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



TOTAL OF HALF-DAY LESSONS 2013/14¹ ACCORDING TO REGION

Bern	255 487
Graubünden	641 059
Eastern Switzerland	108 868
Ticino	8 388
Vaud	206 156
Valais	555 983
Western Switzerland	65 951
Central Switzerland	152 591
Total	1 994 483
Average class size	6.25

¹ Situation at: 31.5.2014, extrapolative estimate for the season 2013/14. Actual up-to-date figures as of August 2014 at www.snowsports.ch.
Source: SWISS SNOWSPORTS

SWITZERLANDMOBILITY

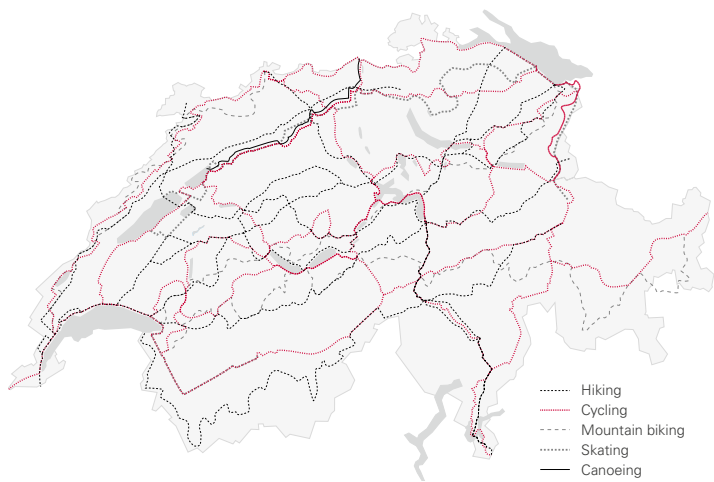
SwitzerlandMobility is the national network of non-motorized traffic for leisure and tourism focusing on the development and communication of the most attractive hiking, cycling, mountain biking, skating, and canoeing routes in Switzerland. SwitzerlandMobility links these routes with public transportation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

SWITZERLANDMOBILITY ROUTE NETWORK

	National routes	Regional routes	Local routes	Number of kilometres
Hiking	7	62	261	12 000
Cycling	9	54	68	12 000
Mountain biking	3	14	136	7 200
Skating	3	13	2	1 000
Canoeing	1	6	23	350
Total	23	149	490	32 550

Status: 31/12/2013

OVERVIEW MAP OF NATIONAL ROUTES



Source: SwitzerlandMobility

SALES GENERATED AS A RESULT OF SWITZERLANDMOBILITY

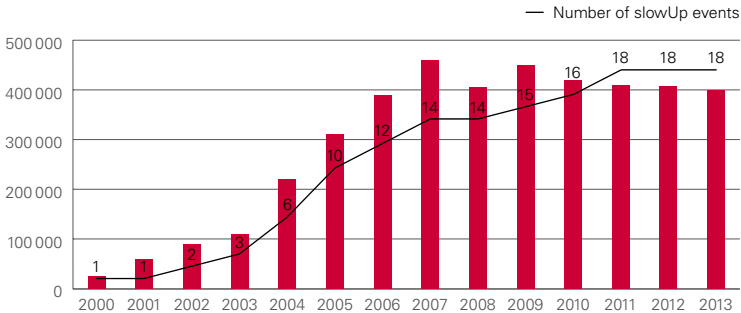
Since SwitzerlandMobility was launched in the spring of 2008, the interest of the Swiss population and foreign tourists has grown steadily: while the web portal schweizmobil.ch registered just over 1 million visits in 2008, the number jumped to over 4.4 million in 2013. In 2011 the LINK-Institute found that about 2 million people, or 24 % of the Swiss population, are familiar with Switzerland-Mobility.

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

SLOW UP

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

GROWTH IN NUMBER OF SLOW UP PARTICIPANTS 2000–2013



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.

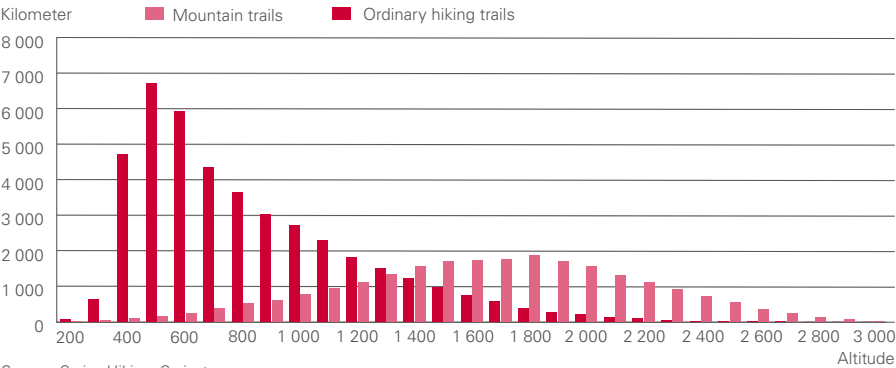
NETWORK OF HIKING TRAILS PER REGION

Region ¹	Total network of walks (km)	Paved walks (km)	Mountain walks (km)
Lake Geneva Region	12 260	2 746	2 504
Schweizer Mittelland	15 448	4 676	2 622
North-West Switzerland	2 791	952	7
Zurich	2 751	974	16
Eastern Switzerland	19 475	4 604	11 058
Central Switzerland	8 154	1 995	2 925
Ticino	4 297	602	3 417
Total	65 176	16 549	22 549

¹ Official FSO main regions of Switzerland
Source: Swiss Hiking

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, Swissstopo

STATISTICS FOR HIKING IN SWITZERLAND (2008)

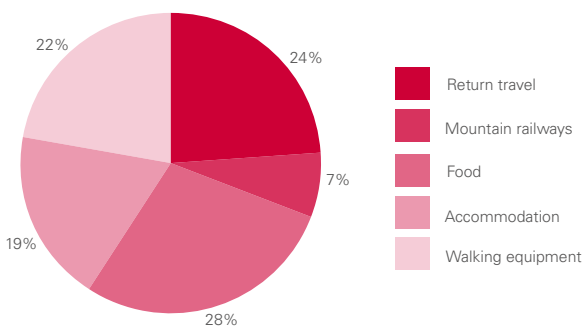
There are around 2 million regular hikers in Switzerland and, on average, they do 20 walks a year. The total number of hiking days per annum is over 40 million.

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

SWISS PARKS

The park environment in Switzerland is taking shape. Following the dynamic changes of the past five years, the latest map (updated June 2014) includes 20 parks and park projects, representing approx. 15 % of the area of Switzerland in 15 different cantons.

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

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

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

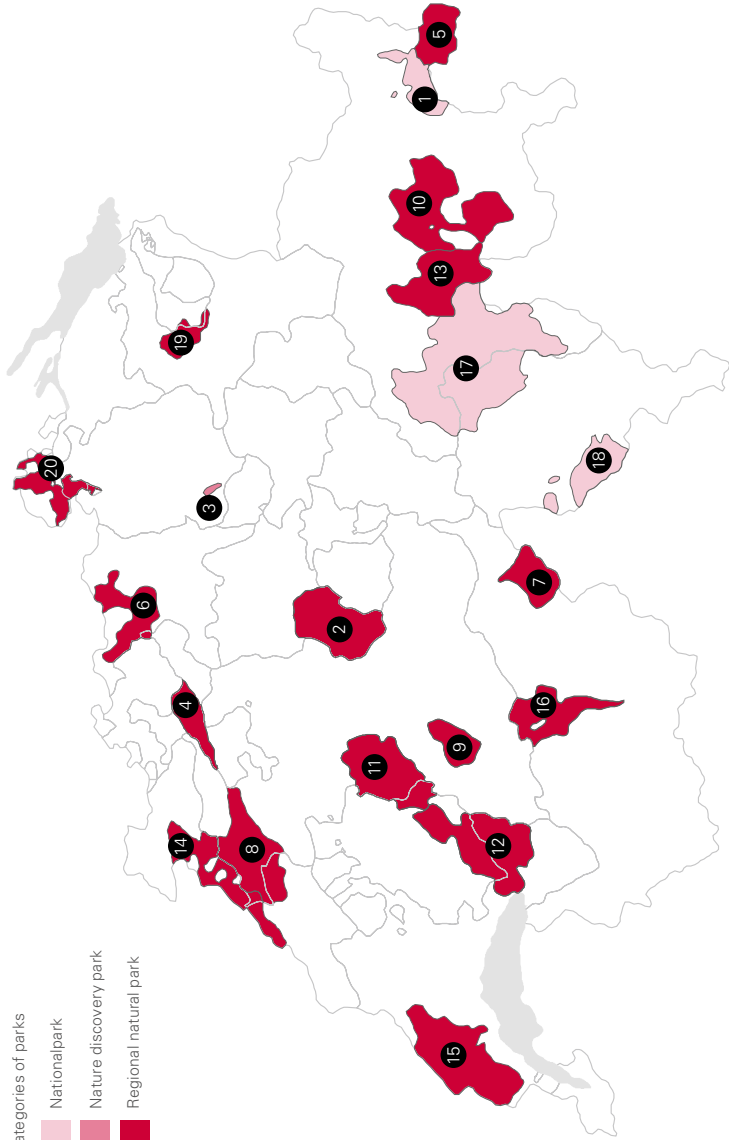
Studies on the value added by tourism in the UNESCO Biosphere Entlebuch (Knaus F., 2012) and the Biosphere Reserve Val Müstair Parc Naziunal (Backhaus N., 2013) have shown that 16 % of the visitors go there because of the Biosphere Entlebuch and as much as 36 % because of the Swiss National Park (so-called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

Source: Swiss Parks Network

SWISS PARKS

Categories of parks

- Nationalpark
- Nature discovery park
- Regional natural park



1 Schweizerischer Nationalpark | 2 UNESCO Biosphäre Entlebuch | 3 Wildnispark Zürich Sihlwald | 4 Naturpark Thal | 5 Biosfera Val Müstair | 6 Jurapark Aargau | 7 Landschaftspark Bimtal | 8 Parc régional Chasseral | 9 Naturpark Diemtital | 10 Parc Ela | 11 Naturpark Gantrisch | 12 Parc naturel régional Gruyère Pays-d'Enhaut | 13 Naturpark Beverin | 14 Parc du Doubs | 15 Parc Jura vaudois | 16 Naturpark Pfyn-Finges | 17 Parc Adula* | 18 Progetto Parco Nazionale del Locarnese* | 19 Naturpark Neckertal* | 20 Naturpark Schaffhausen*

* Park candidate

© Competence Center for Geoinformation, Swiss Parks Network
Park perimeters partially provisional
Source: Federal Office of Topography

Status: June 2014

FORMAL EDUCATION

BASIC VOCATIONAL EDUCATION AND TRAINING

ADVANCED FEDERAL CERTIFICATE (AFC)

Hotel and restaurant	Certificates of qualification issued		Apprentices hired	
	2013	2012	2013	2012
Hotel und Gastrofachmann/-frau	35	39	14	21
Hotelfachmann/-frau EFZ	295	339	338	367
Koch/Köchin EFZ	1677	1 754	1845	1 927
Restaurationsfachmann/-frau EFZ	661	720	648	684

Transport services

Matrose/Matrosin der Binnenschifffahrt	9	8	21	15
Seilbahn-Mechatroniker/-in EFZ	22	16	17	23

Economy and administration

Kaufmann/-frau B				
Hotel-Gastro-Tourismus	24	37	10	10
Öffentlicher Verkehr	6	12	3	3
Reisebüro	13	13	1	1
Transport	5	7	6	4
Kaufmann/-frau E				
Hotel-Gastro-Tourismus	201	223	141	156
Öffentlicher Verkehr	275	281	338	324
Reisebüro	149	167	180	192
Transport	34	32	30	31

BASIC FEDERAL CERTIFICATE (BFC)

Hotel and restaurant				
Hotellerieangestellte/-r EBA	43	47	34	43
Küchenangestellte/-r EBA	302	288	334	363
Restaurationsangestellte/-r EBA	109	112	127	129
Seilbahner/-in	3	2	7	3

Source: Swiss Federal Statistical Office

HIGHER VOCATIONAL EDUCATION AND TRAINING: FINAL EXAMS

FEDERAL CERTIFICATES	Men	2013 Women	Total	2012 Total	2011 Total
Bereichsleiter/-in Hotellerie-Hauswirtschaft	1	73	74	85	–
Cabin Crew Member	17	30	47	45	66
Gastro-Betriebsleiter/-in	31	31	62	57	40
Gastronomiekoch/-köchin	4	0	4	8	81
Hotelempfangs- und Administrationsleiter/-in	–	–	–	–	–
Koch/Köchin der Spital-, Heim- und Gemeinschaftsgastronomie	–	–	–	–	17
Restaurationsleiter/-in	–	–	–	3	22
Fachmann/-frau im Tourismus-Management	–	–	–	–	–
Tourismus-Assistent/-in	6	41	47	26	32
Bergführer/-in	22	3	25	29	28
Schneesportlehrer/-in	87	34	121	174	190
Seilbahnfachmann/-frau	–	–	–	20	–
Fachmann/-frau im Pisten und Rettungsdienst	2	0	2	25	–

FEDERAL DIPLOMAS

Manager/-in Gesundheitstourismus und Bewegung	–	–	–	11	–
Fachmann/-frau öffentlicher Verkehr	12	3	15	17	–
Betriebsleiter/-in der Gemeinschaftsgastronomie	–	–	–	–	20
Küchenchef/-in / Produktionsleiter/-in	4	0	4	23	–
Restaurateur/-in	–	–	–	–	14
Restaurationsleiter/-in	0	1	1	3	–

DIPLOMA OF COLLEGES

Hauswirtschaftliche Betriebsleitung	0	31	31	22	28
Hotelier/-in – Restaurateur/-in	170	266	436	488	447
Tourismusfachmann/-frau	35	185	220	193	196

DIPLOMA OF UNIVERSITIES OF APPLIED SERVICES

Hotel sector – Certificates issued	176	274	450	383	539
Tourism sector (since 2008 Bachelor) – Certificates issued	39	161	200	173	162

Source: Swiss Federal Statistical Office

INTERNATIONAL

TOURIST ARRIVALS

International tourist arrivals grew by 5 % in 2013, reaching a record 1 087 million arrivals, according to the latest UNWTO World Tourism Barometer. Despite global economic challenges, international tourism results were well above expectations, with an additional 52 million international tourists travelling the world in 2013. The tourism sector has shown a remarkable capacity to adjust to the changing market conditions, fuelling growth and job creation around the world, despite the lingering economic and geopolitical challenges.

Demand for international tourism was strongest for destinations in Asia and the Pacific (+6 %), Africa (+6 %) and Europe (+5 %).

	International arrivals in million		Change in %	
	2013 ¹	2012	2013 ¹ /12	2012/11
Europe	562.8	533.9	5.4	3.4
Northern Europe	68.3	65.6	4.1	1.7
Western Europe	173.6	166.7	4.2	3.2
Central/Eastern Europe	118.8	111.2	6.9	7.7
Southern/Mediterranean Europe	202.0	190.4	6.1	1.9
Asia and Pacific	247.7	233.6	6.0	6.8
North-East Asia	127.1	122.8	3.6	6.0
South-East Asia	92.7	84.2	10.0	8.7
Oceania	12.7	12.1	4.4	4.1
South Asia	15.2	14.4	5.3	5.4
Americas	168.9	163.0	3.6	4.5
North America	111.4	106.7	4.3	4.5
Caribbean	20.9	20.7	1.0	2.8
Central America	9.2	8.9	4.2	7.3
South America	27.4	26.7	2.4	5.0
Africa	56.1	53.1	5.6	6.9
North Africa	19.6	18.5	6.2	8.2
Subsaharan Africa	36.5	34.7	5.2	6.2
Middle East	51.9	51.8	0.3	-5.2
World	1 087.0	1 035.0	5.0	4.0

¹ Estimate
Source: World Tourism Organization (UNWTO)

TOP DESTINATIONS

Rank	Country of destination	International arrivals in million		Change in %	
		2012	2011	2012/11	2011/10
1	France	83.0	81.6	1.8	4.8
2	USA	67.0	62.7	6.8	4.9
3	China	57.7	57.6	0.3	3.4
4	Spain	57.7	56.2	2.7	6.6
5	Italy	46.4	46.1	0.5	5.7
6	Turkey	35.7	34.7	3.0	8.4
7	Germany	30.4	28.4	7.3	3.6
8	United Kingdom	29.3	29.3	-0.1	5.5
9	Russia	25.7	22.7	13.4	0.6
10	Malaysia	25.0	24.7	1.3	0.5
32	Switzerland	8.6	8.5	0.4	-1.1

Rank	Country of destination	International tourism receipts in billion US-\$		Change in % based on local currency	
		2012 ¹	2011	2012 ¹ /11	2011/10
1	USA	126.2	115.6	9.2	11.7
2	Spain	55.9	59.9	1.2	8.6
3	France	53.6	54.8	6.0	10.9
4	China	50.0	48.5	3.2	5.8
5	Macao (China)	43.9	38.5	13.7	38.6
6	Italy	41.2	43.0	3.8	5.6
7	Germany	38.1	38.9	6.2	6.7
8	United Kingdom	36.4	35.1	5.2	4.4
9	Thailand	33.8	27.2	26.7	30.5
10	Hong Kong (China)	33.1	28.5	15.9	28.4
18	Switzerland	16.0	17.1	-1.3	-1.1

¹ Estimate

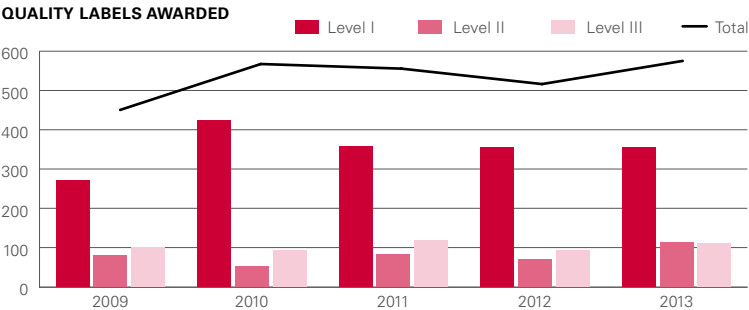
Source: World Tourism Organization (UNWTO)

QUALITY PROMOTION

QUALITY PROGRAMME OF SWISS TOURISM



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



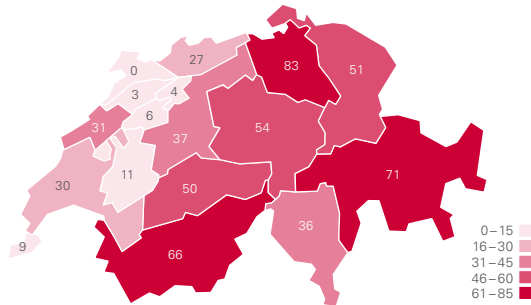
Since 1998 a total of 10 675 individuals have been trained and 7 127 quality labels have been awarded. As compared to 2012, Neuchâtel marks the largest increase in current Q-labels (+39 %); +8 % in gastronomy branch throughout Switzerland.

LABELS PER INDUSTRY

Industry	Labels	in %
Hotel industry	245	42.39
Supplementary accommodation	47	8.13
Tourism organisations	61	10.55

Industry	Labels	in %
Gastronomy	95	16.44
Leisure and culture	14	2.42
Total	578	100.00

LABELS PER REGION



Source: Swiss Tourism Federation, status as of 31/12/2013

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 2013, this quality label was awarded to 23 destinations.



Since 2008 the Swiss Tourism Federation has been awarding a Wellness-Destination quality label to Swiss holiday destinations specialising in wellness services. In 2013 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 new: Zermatt-Matterhorn Aletsch Arena with Riederalp, Bettmeralp, Eggishorn Saas-Fee/Saastal Bellwald Grächen
Lucerne/ Lake Lucerne	Engelberg-Titlis new: UNESCO Biosphere Entlebuch
Eastern Switzerland/ Liechtenstein	Sonnenecke Bodensee Toggenburg Braunwald-Klausenpass Triesenberg Malbun Steg
Graubünden	Flims, Laax, Falera with Trin and Sagogn Arosa Davos Klosters Savognin Lenzerheide
Ticino	new: Ascona Locarno

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 ¹		

¹ Bad Zurzach, Bad Schinznach, Rheinfelden

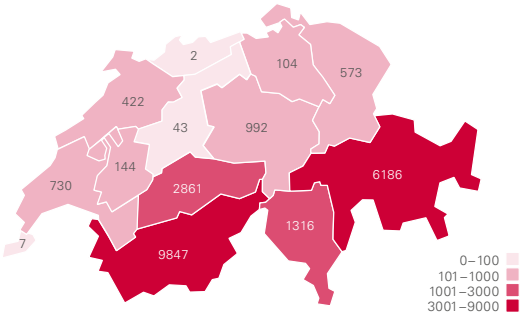
Source: Swiss Tourism Federation



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 2013



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	2013	2012	2011	2010	2009	2008	2007
European Ecolabel	56	52	45	35	7	14	1
ibex fairstay	53	59	61	54	39	31	12

Source: SALADINO Umweltprojekte, ibex fairstay

TOURISM ASSOCIATIONS AND INSTITUTES

Tourism interest groups and professional associations

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, info@agrotourismus.ch. Umbrella organisation for the marketing and coordination of agritourist services in Switzerland with over 400 members.

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

Secretariat, Obstadtstrasse 25, 8880 Valenstadt, phone +41 (0)79 833 81 75, www.vdh.ch, welcome@vdh.ch. Networking, further education and friendship care for students of the postdiploma course 'Unternehmensführung resp. Nachdiplomstudium HF-NDS' of hotelleriesuisse.

Association of Swiss Tourism Managers (ASTM)

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

Association of the Swiss Navigation Companies

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

Bed and Breakfast Switzerland

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

Community of Interest of the Higher Schools of Tourism Management Switzerland

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

CONTACT groups.ch – Hotels and Holiday Homes for Groups

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

GastroSuisse

Blumenfeldstrasse 20, P.O. Box, 8046 Zurich, phone +41 (0)848 377 111, fax +41 (0)848 377 112, www.gastrosuisse.ch, info@gastrosuisse.ch. GastroSuisse is the association for hotels and restaurants in Switzerland. Around 20 000 members organised in 26 cantonal sections and 5 specialist groups belong to Switzerland's largest employers' association in the hospitality industry.

hotelleriesuisse

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

Hotel & Gastro Union

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

Parahotellerie Switzerland

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

Safety in adventures

Office: beco Berner Wirtschaft, Münsterplatz 3, 3011 Bern, www.safetyinadventures.ch, 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. 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.

Swiss Association of Public Transport

Dählhölzliweg 12, 3000 Bern 6, phone +41 (0)31 359 23 23, fax +41 (0)31 359 23 10, www.voev.ch, info@voev.ch.

Swiss Cableways

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

swisscamps

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

Swiss Centre for mountain regions (SAB)

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

SWISS CITIES

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

Swiss Hiking Trail Federation

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

Swiss Parks Network

Monbijoustrasse 61, 3007 Bern, phone +41 (0)31 381 10 71, info@paerke.ch, www.paerke.ch. The network is an umbrella organisation which administers the interests of its members and assists them in establishing and operating parks and to ensure their quality in the long-term.

SWISS SNOWSPORTS

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

Swiss Tourism Federation (STF)

Finkenhubelweg 11, P.O. Box 8275, 3001 Bern, phone +41 (0)31 307 47 47, fax +41 (0)31 307 47 48, www.swisstourfed.ch, info@swisstourfed.ch. To safeguard the interests of those responsible for tourism in Switzerland and to participate in all tourism policy decisions; to provide information about the importance of tourism and to contribute to tourism research.

Swiss Travel Savings Fund (Reka) Cooperative

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

The promotion of social and family tourism, vacation and leisure financing by issuing reka currency, running of reka vacation centres, vacation apartment rentals.

Swiss Youth Hostels (SYH)

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

SwitzerlandMobility

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

Thermal Spas and Health Hotels Switzerland

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

Touring Club Switzerland (TCS)

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

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

Public corporations

Swiss Association for Hotel Credit (SGH)

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

Switzerland Tourism (ST)

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

Federal institutes

State Secretariat for Economic Affairs (SECO)

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

Swiss Federal Statistical Office (FSO)

Tourism section, Espace de l'Europe 10, 2010 Neuchâtel, phone +41 (0)32 867 24 40, fax +41 (0)32 713 62 15, www.tourismus.bfs.admin.ch, info-tour@bfs.admin.ch. To provide statistics on Swiss tourism (surveys on infrastructure, arrivals and overnight stays in hotels, camping places and youth hostels, tourism balance of payments, tourism satellite account and travel behavior).

Institutes of higher education

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

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

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

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

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

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

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

Comercialstrasse 22, 7000 Chur, phone +41 (0)81 286 39 54, fax +41 (0)81 286 39 49, www.itf.ch, itf@htwchur.ch.
BSc and MSC study programmes and further education (CAS, DAS, MAS, EMBA) in tourism and leisure management.
Applied research and consultation in the areas of eTourism, destination management, hospitality, client management and surveys and human environmental system.

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

Schanzeneckstrasse 1, P.O. Box 8573, 3001 Bern, phone +41 (0)31 631 37 11, fax +41 (0)31 631 34 15, www.cred.unibe.ch, info@cred.unibe.ch. Teaching, research and services, in particular concerning regional-economics, impact research, sustainable development in tourism, quality of services and experience economy in tourism, macroeconomic questions.

International Tourism Organisations

European Travel Commission (ETC)

Rue du Marché aux Herbes 61, 1000 Brussels, Belgium, phone +32 2 502 01 13, fax +32 2 514 18 433, www.etc-corporate.org, info@etc-corporate.org.

EUROSTAT

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

Hotels, Restaurants & Cafés in Europe (HOTREC)

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

World Tourism Organization (UNWTO)

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