

STV  **FST**

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

SWISS TOURISM IN FIGURES 2015

STRUCTURE AND INDUSTRY DATA

PARTNERSHIP. POLITICS. QUALITY.



QUALITY
Our Passion



FAMILY
Destination



WELLNESS
Destination



APARTMENT
Holiday Comfort

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AT A GLANCE

CHF 47,8 billion¹

total revenue generated by Swiss tourism

28 737 km public transportation network

25 836 train stations and stops

49 471 225 air passengers

460 978 flights

CHF 17,4 billion¹

gross value added

28 806 restaurants

8472 trainees

CHF 15,7 billion²

revenue from foreign tourists in Switzerland

CHF 15,4 billion²

outlays by Swiss tourists abroad

170 118 full-time equivalents¹

35 628 476 hotel overnight stays

average stay = 2,0 nights

5055 hotels and health establishments

273 507 hotel beds

One of the largest export industries in Switzerland

4,7% of export revenue

¹ Swiss Federal Statistical Office, Annual indicators of the Tourism Satellite Account TSA 2014 (first estimate)

² Swiss Federal Statistical Office, Tourism Balance of payments

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

LEGAL BASES

NATIONAL TOURISM LAWS

MARKETING SWITZERLAND AS A TOURIST DESTINATION

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

PROMOTION OF INNOVATION, COOPERATION AND KNOWLEDGE CREATION IN TOURISM

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

PROMOTION OF THE HOTEL INDUSTRY

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

REGIONAL POLICY

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

CASINOS

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

TEMPORARY SPECIAL RATE FOR ACCOMMODATION SERVICES

Federal Act on Value Added Tax of 12 June 2009, Status as of 10 May 2016 (SR 641.20)

TOURISM STATISTICS

Ordinance on the Conduct of Federal Statistical Surveys of 30 June 1993,
Status as of 1 December 2015 (SR 431.012.1)

NATURE PARKS

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

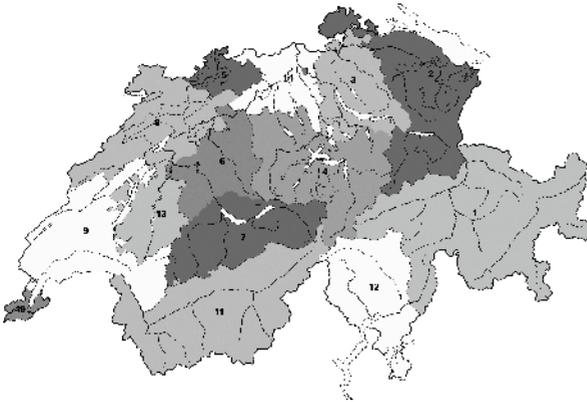
CABLECARS AND CHAIRLIFTS

Federal Act on Cableways for Passenger Transport of 23 June 2006, Status as of 1 January 2016
(SR 743.01)

CANTONAL TOURISM LAWS

Canton	Internet	Law
Aargau	www.ag.ch	Location Development Act of 1 January 2010
Appenzell Innerrhoden	www.ai.ch	Promotion of Tourism Act of 25 April 1999
Appenzell Ausserrhoden	www.ar.ch	Tourism Act of 25 April 1976
Basel-Landschaft	www.bl.ch	Tourism Act of 19 June 2003
Basel-Stadt	www.bs.ch	Location Development Act of 29 June 2006
Bern	www.be.ch	Tourism Development Act of 20 June 2005
Fribourg	www.fr.ch	Tourism Act of 13 October 2005
Geneva	www.ge.ch	Tourism Act of 24 June 1993
Glarus	www.gl.ch	Tourism Development Act of 6 May 2007
Graubünden	www.gr.ch	Economic Development Act of 27 August 2015
Jura	www.jura.ch	Tourism Act of 31 May 1990
Lucerne	www.lu.ch	Tourism Act of 30 January 1996
Neuchâtel	www.ne.ch	Law to support the development of tourism (L'Tour) of 18 February 2014
Nidwalden	www.nw.ch	Tourism Act of 25 April 1971
Obwalden	www.ow.ch	Tourism Act of 3 May 2012
St. Gallen	www.sg.ch	Tourism Act of 26 November 1995
Schaffhausen	www.sh.ch	No tourism law
Solothurn	www.so.ch	Economic and Labour Law (WAG) of 8 March 2015
Schwyz	www.sz.ch	Law on Economic Development of 27 November 1986
Thurgau	www.tg.ch	Law on Actions against Unemployment and for Location Development of 28 November 1988
Ticino	www.ti.ch	Tourism Act of 25 June 2014
Uri	www.ur.ch	Tourism Promotion Act of 23 September 2012
Vaud	www.vd.ch	Promotion of Tourism Act of 12 June 2007
Valais	www.vs.ch	Tourism Act of 9 February 1996
Zug	www.zg.ch	Tourism Act of 27 March 2003
Zurich	www.zh.ch	No tourism law

TOURIST REGIONS



© Swiss Federal Statistical Office, ThemaKart
As of 2015

-
- 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: district Baden; 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).

 - 5 **Basel Region:** Cantons of Basel-Stadt and Basel-Landschaft; Canton of Solothurn: districts Dorneck and Thierstein, parts of district of Thal.

 - 6 **Bern Region:** Canton of Bern: districts of Emmental, Oberaargau, Bern-Mittelland, parts of districts Seeland and of Thun. Canton of Solothurn: parts of the district of Gäu.

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

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

 - 9 **Lake Geneva (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

 - 14 **Aargau Region:** Canton of Aargau (without district Baden); Canton of Solothurn: districts of Olten, Gösgen and parts of the district Gäu

TOURISM – AN IMPORTANT SECTOR OF THE ECONOMY

Domestic and international tourism are important factors in the Swiss economy. Of a total revenue of CHF 47.8 billion in 2014, 21.9 billion or almost 45.8% came from tourist accommodation, meals and transportation. These three tourism products are responsible for 63.1% 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 2014, approximately 4.7% of Switzerland's export revenue (goods without nonmonetary gold and services) come from tourism.¹

EXPORT REVENUE

Industry	2015 CHF bn	2014 CHF bn	2013 CHF bn	2012 CHF bn	2011 CHF bn
Chemical industry	84.7	85.3	80.9	79.0	74.6
Metal and machine industry	57.3	60.5	60.0	59.4	64.0
Merchanting ²	25.0	25.1	23.3	26.9	27.6
Watchmaking industry	21.5	22.3	21.8	21.4	19.3
Financial services ²	19.9	20.3	20.8	20.7	21.9
Tourism (Tourism Balance of Payments)	15.7	16.3	15.5	15.1	15.2

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 from the Data portal of the Swiss National Bank: data.snb.ch (access on 8 June 2016).

Sources: Swiss Federal Statistical Office, Swiss National Bank

TOURISM BALANCE OF PAYMENTS

LARGEST SHARE OF INCOME FROM TRAVEL WITH OVERNIGHT STAYS

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

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

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

TOURISM BALANCE OF PAYMENTS

Revenue / Expenditure in billion CHF	Revenue from foreign tourists			Expenditure of Swiss tourists abroad		
	2015 ²	2014 ¹	2013 ¹	2015 ²	2014 ¹	2013 ¹
Tourism, including overnight stays	10.6	10.9	10.7	11.2	11.4	11.0
Visitors staying in lodging facilities and with relatives	7.4	7.7	7.5			
Educational & medical stays	3.2	3.2	3.2			
Excursionists, transit visitors, other tourism	2.6	3.0	2.6	4.2	4.0	4.0
Consumption expenditure of border workers incl. short-term residents (< 4 months)	2.5	2.4	2.3			
Total	15.7	16.3	15.5	15.4	15.4	15.0

¹ Revised figures

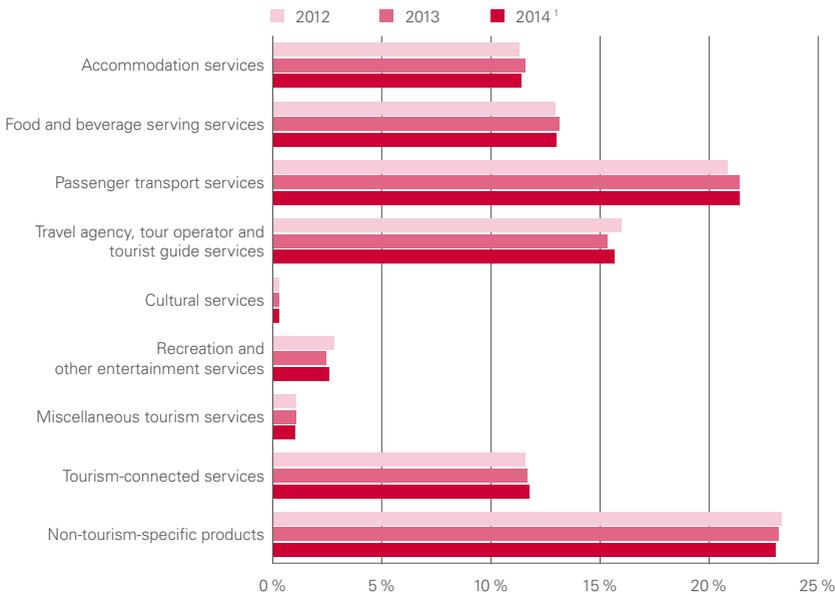
² Provisional figures

Source: Swiss Federal Statistical Office, Tourism balance of payments

THE TOURISM SATELLITE ACCOUNT * INCREASE IN OVERALL TOURISM DEMAND

Overall tourism demand rose considerably again in 2014 (1.1%) after previously falling during the preceding years (2012: -0.1%; 2013: -0.2%). A positive development was observed for most products in 2014, leading to an increase in the overall tourism demand to a total of CHF 47,808 billion. The decrease in accommodation services (-0.4%) and food and beverage serving services (-0.04%) remained relatively slight and was compensated with the higher growth among passenger transport services (1.0%), travel agencies (3.2%) and tourism-connected products (2.1%).

SHARES OF THE TOURISM INDUSTRY IN SWITZERLAND



¹ First Estimate

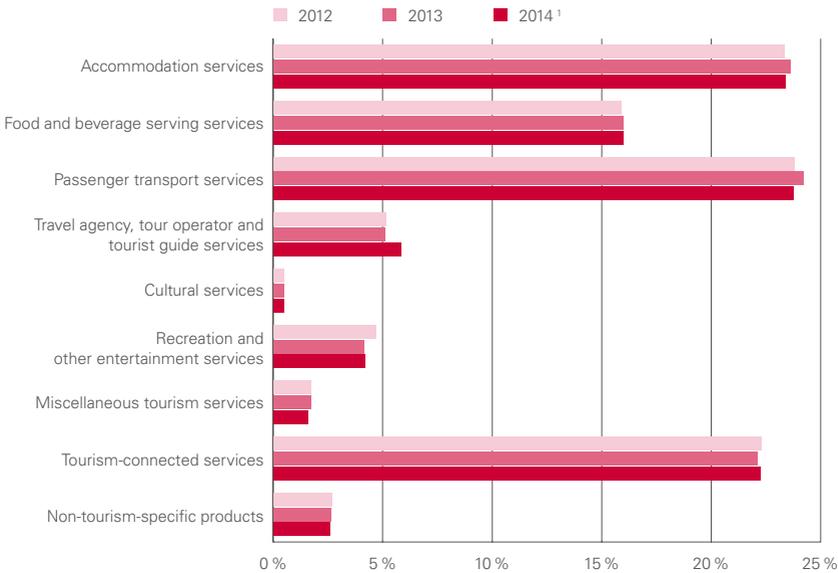
Source: Swiss Federal Statistical Office, Annual indicators of the Tourism Satellite Account

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

THE TOURISM SATELLITE ACCOUNT HIGH GROSS VALUE ADDED GROWTH

In 2014, the total gross value added by tourism showed strong growth (1.8%). Overall, this amounted to CHF 17.386 billion. Almost every product recorded positive gross value added trends, with the growth of recreation and other entertainment services registering an increase of 3.8%. The product categories ‘food and beverage serving services’ (1.7%) and ‘accommodation services’ (0.8%) overall registered higher growth than ‘passenger transport services’ (-0.3%). Growth for tourism-connected products was 2.3% and for non-tourism-specific products -0.4%.

SHARE OF TOURISM GROSS VALUE ADDED ACCORDING TO PRODUCTS



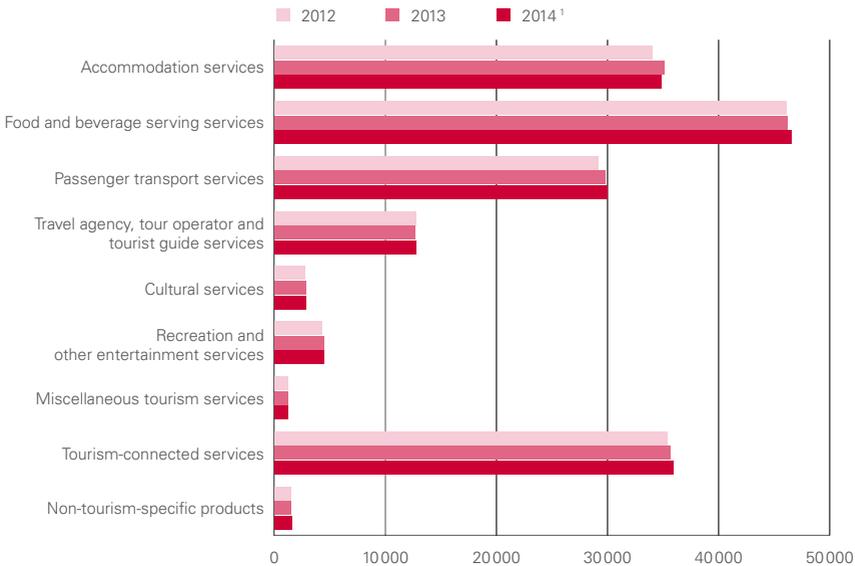
¹ First Estimate

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

THE TOURISM SATELLITE ACCOUNT SLIGHT GROWTH IN TOURISM EMPLOYMENT

Although the overall tourism demand and the gross value added recorded high growth rates, tourism employment in full-time equivalents grow slightly in 2014 (0.4%) to 170 118 full-time equivalents. A decrease was registered only for the product ‘accommodation services’ (–0.8%). All remaining products registered an increase in tourism employment in which the products ‘food and beverage serving services’ (0.8%), ‘passenger transport services’ (0.6%) and ‘travel agencies’ (0.9%) showed only a moderate growth rate.

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

EMPLOYMENT STATISTIC

TRANSPORT, ACCOMMODATION AND FOOD SERVICE ACTIVITIES

FULL-TIME EQUIVALENTS ACCORDING TO ECONOMIC SECTORS

(IN 1000, ANNUAL AVERAGE)

		2015	2014	2013	2012	2011	2010
Service industry	Total	2842.6	2808.5	2783.4	2719.3	2653.4	2612.5
	Men	1539.7	1524.1	1514.6	1477.5	1443.4	1420.1
	Women	1302.9	1284.3	1268.7	1241.8	1210.0	1192.4
Accommodation	Total	63.6	65.2	65.7	66.0	68.0	70.9
	Men	29.7	30.3	30.6	30.6	31.5	32.5
	Women	33.9	34.8	35.1	35.4	36.5	38.4
Food and beverage service activities	Total	119.8	120.5	119.0	121.0	124.7	129.0
	Men	58.6	59.8	59.2	59.3	61.0	62.7
	Women	61.1	60.7	59.8	61.7	63.7	66.2
Land transport and transport via pipelines	Total	105.8	104.9	104.0	102.0	99.0	97.3
	Men	91.3	90.6	90.0	88.2	86.0	84.4
	Women	14.6	14.3	14.1	13.8	13.0	12.9
Water transport and air transport	Total	13.8	14.0	14.0	13.2	12.3	11.1
	Men	8.5	8.6	8.5	8.0	7.4	6.6
	Women	5.4	5.4	5.5	5.2	4.9	4.5

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

	2015 4 th quarter	2015 3 rd quarter	2015 2 nd quarter	2015 1 st quarter	2014 4 th quarter
Full-time jobs (90% and over)	138.9	135.4	138.2	139.0	141.1
Men	77.2	73.9	77	77.7	79.1
Women	61.7	61.5	61.3	61.3	62.0
Part-time jobs I (50–89%)	48.3	46.7	47.4	45.9	45.7
Part-time jobs II (15–49%)	42.5	42.3	40.8	39.4	40.7
Part-time jobs III (< 15%)	26.6	27.7	23.7	23.4	23.7
Total number of jobs (overall)	256.3	252.1	250	247.6	251.2
Men	109.8	104.3	106.2	106.2	108.1
Women	146.4	147.8	143.8	141.4	143.1

Source: Swiss Federal Statistical Office, Employment statistic

TRAVEL BEHAVIOUR OF THE SWISS RESIDENT POPULATION

In 2014, 88% of the Swiss resident population¹ undertook at least one trip with one or more overnight stays away from home. A total of 21.2 million trips were made, of which 7.7 million were within Switzerland. On average 2.9 trips were made per person, of which 1.0 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 3.2 trips per year, people aged 65 or over took an average of 2.2 trips with overnight stays.

NUMBER OF TRIPS (IN 1000)

	2014	2013	2012
Trips with overnight stays	21 159	22 217	20 341
Day trips	75 780	76 447	71 651

In addition to trips with overnight stays, data on day trips are also collected. The Swiss resident population undertook a total of 75.8 million day trips in 2014, corresponding to an average of 10.3 trips per person. Differences between language regions are observed. People living in the German-speaking part of Switzerland undertook 11.7 day trips, whereas one from the French- or Italian-speaking population made 7.0 and 5.2 trips per year respectively.

NUMBER OF TRIPS (PER PERSON)

	2014	2013	2012
Trips with overnight stays	2.9	3.0	2.8
Day trips	10.3	10.5	9.9

¹ Swiss resident population aged 6 or over: 7 374 090 persons
Source: Swiss Federal Statistical Office, Travel behaviour 2014

TRAVEL DESTINATIONS

Among the trips with overnight stays recorded in 2014, 37% had a Swiss destination. 39% of trips led to countries that border Switzerland, namely Germany (12%), Italy (12%) and France (9%). Compared to 2013, the number of trips to Italy increased by 31%. Finally, 18% of trips had a destination in other European countries and 7% outside Europe.

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

	2014	2013	2012
Switzerland	7 732	8 648	7 417
Germany	2 639	2 952	3 053
Austria	1 019	981	949
Italy	2 557	1 951	2 091
France ¹	2 003	2 247	2 042
Southeast Europe ²	972	933	764
Southwest Europe ³	1 497	1 310	1 084
Rest of Europe	1 283	1 616	1 396
Rest of the world	1 454	1 575	1 544
Unknown	3	4	0
Total	21 159	22 217	20 341

¹ Including overseas departments and Monaco

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

³ Spain, Portugal, Andorra, Gibraltar

DURATION AND PURPOSE OF TRAVEL

Trips with a destination abroad lasted longer than trips within Switzerland. In 2014, trips of 4 or more overnight stays represented 66% of the outbound and only 39% of the inbound trips. On the other hand, trips with only one overnight stay accounted for 28% of domestic and 9% of trips abroad. In 2014, the main reasons for trips were, as in the previous year, holidays and recreation. They accounted for 63% 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 (21%). Business trips accounted for 6% of trips.

Source: Swiss Federal Statistical Office, Travel behaviour 2014

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 2015, the Swiss hotel industry recorded a total of 35.6 million overnight stays, which was 0.8% less than in the previous year. Swiss demand amounted to 16.1 million overnight stays, which corresponds to stable result (+0.2% compared with 2014). Foreign guests generated 19.6 million overnight stays, i.e. a drop of 1.7%. Germany accounted for the strongest foreign demand with 3.9 million overnight stays (-12.3% compared with 2014), followed by the United States with 1.7 million overnight stays (+5.7%) and the United Kingdom with 1.6 million (-1.6%). In terms of tourist regions, the Zurich Region recorded the highest number of overnight stays in 2015 with 5.6 million units (+3.9%). It was followed by Graubünden with 4.7 million overnight stays (-6.6%) and Valais with 3.7 million overnight stays (-3.8%). In 2015, visitors stayed an average of 2.0 nights in Switzerland. For guests from within Switzerland the average length of stay was 2.0 nights while for those from abroad it was 2.1 nights. Among the tourist regions, Graubünden recorded the longest average stay with 2.8 nights.

DEVELOPMENT OF OVERNIGHT STAYS 2015

MONTHLY OVERNIGHT STAYS AND CHANGE IN % COMPARED TO THE SAME PERIOD OF 2014

	Overnight stays Total	Change in %	Overnight stays Foreigners	Change in %	Overnight stays Swiss	Change in %
January	2 765 550	-0.6	1 428 158	-1.8	1 337 392	0.6
February	3 115 410	6.7	1 574 187	4.8	1 541 223	8.8
March	2 987 195	-7.4	1 613 509	-8.1	1 373 686	-6.6
April	2 344 338	-0.5	1 289 196	-4.2	1 055 142	4.4
May	2 616 805	-0.1	1 534 819	0.8	1 081 986	-1.4
June	3 216 833	0.6	1 891 936	0.1	1 324 897	1.2
July	4 075 726	4.0	2 320 088	3.9	1 755 638	4.1
August	4 123 659	-3.2	2 424 041	-4.5	1 699 618	-1.1
September	3 360 603	-0.7	1 820 161	0.6	1 540 442	-2.2
October	2 686 864	-3.4	1 371 635	-3.6	1 315 229	-3.3
November	1 866 861	0.0	997 128	0.6	869 733	-0.8
December	2 468 632	-5.6	1 311 437	-9.1	1 157 195	-1.4
Entire year	35 628 476	-0.8	19 576 295	-1.7	16 052 181	0.2

Source: Swiss Federal Statistical Office, Statistics on tourist accommodation

OVERNIGHT STAYS BY COUNTRY OF RESIDENCE OF VISITORS

Country of residence of visitors	Calendar year 2015	Winter season 2014/2015 (November to April)	Summer season 2015 (Mai to October)
Total	35 628 476	15 695 268	20 080 490
Switzerland	16 052 181	7 357 201	8 717 810
Foreign countries	19 576 295	8 338 067	11 362 680
Europe total (excl. Switzerland)	11 788 182	5 894 492	6 053 676
Germany	3 853 180	1 915 438	2 010 174
United Kingdom ¹	1 640 457	788 402	853 600
France	1 254 447	640 490	628 015
Italy	936 913	473 343	470 968
Netherlands	583 831	298 120	301 488
Belgium	566 201	294 702	279 200
Russia	369 264	233 621	155 370
Nordic countries ²	459 768	246 798	218 424
Spain	396 044	167 052	230 887
Austria	373 235	157 027	217 722
Other countries Europe	1 354 842	679 499	687 828
America total	2 419 448	857 649	1 557 433
United States	1 738 838	572 210	1 158 065
Canada	234 218	86 823	147 335
Brazil	225 239	113 738	117 151
Other countries America	221 153	84 878	134 882
Asia total	4 741 090	1 342 962	3 373 229
China (incl. Hong Kong)	1 519 100	443 979	1 068 153
Gulf States ³	929 799	181 017	735 050
Japan	394 784	84 469	312 996
India	591 924	116 772	472 249
Republic of Korea	317 022	108 646	204 687
Other countries Asia	988 461	408 079	580 094
Africa total	302 201	135 405	161 398
Australia, Oceania total	325 374	107 559	216 944

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

**HOTEL INDUSTRY: SUPPLY AND DEMAND
CANTONS**

Canton	Capacity ¹		Overnight stays in thousands			Net occupancy rate in %	
	Rooms	Beds	Swiss	Foreigners	Total	Rooms ²	Beds ³
Graubünden	18 508	38 461	2 790	1 927	4 717	47	38
Bern	16 460	32 308	2 186	2 789	4 975	53	45
Zurich	14 808	25 606	1 389	3 623	5 012	65	54
Valais	13 779	28 558	2 061	1 677	3 738	47	40
Vaud	9 612	18 210	1 195	1 480	2 674	52	41
Geneva	9 282	15 249	566	2 387	2 953	65	53
Ticino	8 102	15 993	1 348	832	2 180	46	39
Lucerne	6 588	12 325	723	1 307	2 030	54	46
St. Gallen	4 916	9 571	557	411	968	38	29
Basel-Stadt	4 067	7 306	398	804	1 202	62	45
Aargau	3 133	5 238	358	344	702	48	38
Schwyz	2 204	4 351	380	211	591	43	39
Thurgau	2 176	3 846	273	146	418	40	31
Fribourg	2 095	4 310	283	169	452	40	29
Obwalden	2 056	4 203	258	405	663	54	46
Solothurn	1 683	3 032	198	198	396	47	37
Basel-Landschaft	1 344	2 452	142	150	292	44	33
Zug	1 277	2 076	138	190	327	55	44
Uri	1 261	2 650	97	144	241	37	28
Neuchâtel	1 149	2 219	117	107	224	39	28
Appenzell Ausserrhoden	888	1 600	90	28	118	27	22
Jura	838	1 726	89	17	107	25	18
Nidwalden	766	1 641	98	115	213	47	37
Glarus	723	1 558	108	20	128	30	25
Schaffhausen	678	1 320	78	74	152	45	33
Appenzell Innerrhoden	587	1 814	133	22	154	45	26
Total	128 979	247 625	16 052	19 576	35 628	52	42

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 region	Capacity ¹		Overnight stays in thousands			Net occupancy rate in %	
	Rooms	Beds	Swiss	Foreigners	Total	Rooms ²	Beds ³
Graubünden	18 508	38 461	2 790	1 927	4 717	46.7	38.1
Zurich Region	17 266	29 698	1 653	3 959	5 612	63.3	52.2
Valais	13 779	28 558	2 061	1 677	3 738	47.3	39.6
Lucerne/Lake Lucerne	12 310	24 178	1 484	2 123	3 607	50.6	42.8
Bernese Oberland	11 449	23 309	1 542	2 180	3 722	54.8	47.5
Eastern Switzerland	9 713	19 223	1 214	671	1 885	37.3	28.4
Lake Geneva Region (Vaud)	9 612	18 210	1 195	1 480	2 674	52.5	41.3
Geneva	9 282	15 249	566	2 387	2 953	64.6	53.2
Ticino	8 102	15 993	1 348	832	2 180	46.2	38.6
Basel Region	5 574	10 028	552	968	1 521	57.3	42.1
Jura & Three-Lakes	3 949	7 487	448	297	745	38.4	28.2
Bern Region	3 889	6 985	511	526	1 037	52.5	42.0
Aargau Region	3 452	5 935	405	380	786	47.3	37.2
Fribourg Region	2 095	4 310	283	169	452	39.9	29.5
Total	128 979	247 625	16 052	19 576	35 628	51.5	41.7

COMMUNES

Communes	Capacity ¹		Overnight stays in thousands			Net occupancy rate in %	
	Rooms	Beds	Swiss	Foreigners	Total	Rooms ²	Beds ³
Zurich	8 013	14 017	613	2 335	2 948	69.9	57.7
Geneva	6 351	10 426	279	1 759	2 038	65.0	53.6
Basel	3 957	7 117	390	799	1 190	63.4	46.2
Zermatt	3 232	6 402	566	688	1 254	65.8	58.7
Davos	3 031	5 920	423	374	797	51.8	43.4
Lucerne	3 025	5 795	332	948	1 280	71.1	61.3
Lausanne	2 507	4 439	329	434	762	60.7	47.5
St. Moritz	2 090	3 951	185	415	600	55.3	47.3
Bern	2 041	3 451	305	410	715	66.7	56.9
Opfikon	1 913	3 121	182	507	689	69.2	60.5
Lugano	1 647	3 099	211	280	491	53.0	43.9
Interlaken	1 486	2 861	126	584	710	72.3	68.4
Meyrin	1 390	2 087	152	299	451	70.2	59.3
Other communes	88 296	174 938	11 959	9 744	21 703	43.2	34.6
Total	128 979	247 625	16 052	19 576	35 628	51.5	41.7

SUPPLY IN HOTELS AND HEALTH ESTABLISHMENTS

Year	Surveyed establishments	Surveyed rooms	Surveyed beds	Open establishments	Available rooms	Available beds
2015	5 055	141 018	273 507	4 509	128 979	247 625
2014	5 129	140 722	272 636	4 554	128 638	246 449
2013	5 191	140 192	271 298	4 662	128 648	246 489
2012	5 257	140 372	271 168	4 742	129 097	246 951
2011	5 396	142 101	273 969	4 773	128 719	245 072
2010	5 477	142 815	275 193	4 827	128 865	245 251

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
2015	17 429 421	35 628 476	2.0	51.5	41.7
2014	17 162 053	35 933 512	2.1	52.0	42.2
2013	16 831 177	35 623 883	2.1	51.6	41.9
2012	16 297 767	34 766 273	2.1	50.5	40.8
2011	16 228 987	35 486 256	2.2	51.6	41.9
2010	16 202 574	36 207 812	2.2	52.3	42.9

SIZE OF HOTELS AND HEALTH ESTABLISHMENTS

Size of establishment	Open establishments	in %	Arrivals	Overnight stays
0 to 10 beds	653	14.5	153 334	335 261
11 to 20 beds	977	21.7	625 269	1 315 778
21 to 50 beds	1 497	33.2	2 955 778	6 272 212
51 to 100 beds	842	18.7	4 512 976	9 446 782
101 to 150 beds	264	5.8	2 769 221	5 597 921
151 to 200 beds	109	2.4	1 458 206	3 164 212
201 to 300 beds	102	2.3	2 239 018	4 550 665
301 and more beds	66	1.5	2 715 619	4 945 645
Total	4 509	100.0	17 429 421	35 628 476

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

SUPPLEMENTARY ACCOMMODATION ¹

HOLIDAY APARTMENTS

ANALYSIS OF SUPPLEMENTARY ACCOMODATION 'PASTA LIGHT'

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

The total annual overnights from holiday apartments in Switzerland are estimated to be approx. 18 million per year (basis: last FSO survey 2003). In 2015, around 60 000 holiday apartments and more than 8 million overnights were surveyed. The average duration of residence has been approx. 8 nights and the occupancy rate of the holiday apartments has been 50 nights. 64.8% of the guests came from Switzerland, 29.8% from Europe (Switzerland excluded) and 5.4% from the rest of the world.

Overnights in holiday apartments in Switzerland have declined from 2014 to 2015 (-3.9%).²

CHANGE IN OVERNIGHT STAYS FROM 2014 TO 2015 ²	in %
Fribourg Region	1.0
Valais	-0.1
Basel Region	-1.8
Lucerne/Lake Lucerne	-3.0
Graubünden	-6.7
Eastern Switzerland/Liechtenstein	-7.3
Lake Geneva Region (Vaud)	-9.3
Bernese Oberland	-9.9
Ticino	-10.3
Jura & Three-Lakes	-13.8
Geneva	x
Zurich Region	x
Bern Region	x
Aargau Region	x

GUESTS' COUNTRY OF ORIGIN (OVERNIGHT STAYS)	in %		in %
Switzerland	64.8	United States	1.0
Germany	11.4	Italy	0.8
France	4.2	Spain	0.6
Netherlands	4.0	Russia (Russian Federation)	0.5
Great Britain	3.1	India	0.5
Belgium	2.4	Israel	0.5
Saudi Arabia	1.0	Poland	0.4

¹ Non-hotel accommodation

² Including holiday apartments with occupancy information for both years. The data base fluctuates and differs from region to region. Geneva, Zurich Region, Bern Region and Aargau Region have no representative data.

Source: Swiss Tourism Federation

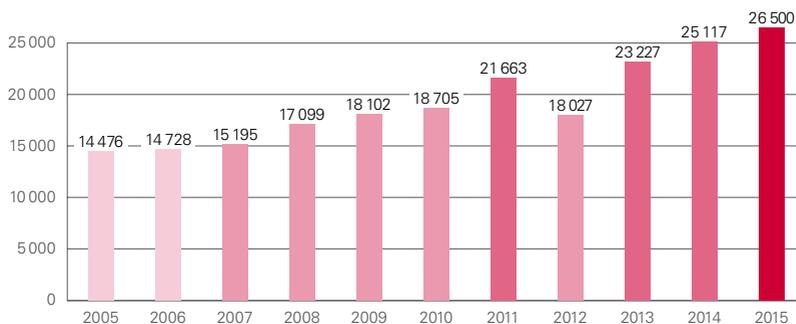
CLASSIFIED HOLIDAY APARTMENTS AND GUEST ROOMS

HOLIDAY APARTMENTS AND GUEST ROOMS BY REGIONS

Tourist region	A *****	A *****	A ****	A ****	A ***	A ***	A **	A **	A *	A *	Total
Valais	24	446	79	2 018	577	6 250	577	1 088	114	26	11 213
Graubünden	6	185	54	1 161	439	3 944	497	604	79	13	6 983
Bernese Oberland	2	73	19	583	154	1 758	234	273	74	0	3 188
Ticino	0	20	11	200	63	895	91	142	35	7	1 465
Lucerne/Lake Lucerne	0	21	100	109	43	700	81	119	17	2	1 223
Lake Geneva Region (Vaud)	1	49	10	135	54	383	58	95	9	3	909
Eastern Switzerland/Liechtenstein	0	1	4	117	21	314	54	65	18	1	619
Jura & Three-Lakes	0	3	0	27	17	193	54	55	12	1	525
Fribourg Region	0	1	0	18	5	97	17	26	4	0	199
Zurich Region	0	4	0	17	2	93	0	5	0	1	122
Bern Region	1	0	0	3	2	16	0	9	0	2	34
Geneva	0	0	0	6	0	3	0	0	0	1	12
Aargau Region	0	0	0	1	0	2	0	1	0	0	4
Basel Region	0	1	0	1	0	1	0	1	0	0	4
Total	34	804	277	4 394	1 377	14 649	1 663	2 483	362	57	26 500¹

¹ Of these, 400 objects are guest rooms.

AWARDED CERTIFICATES 2005 – 2015



As of 31.12.2015

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

Source: Swiss Tourism Federation

GROUP LODGINGS

CONTACT groups.ch is the private umbrella organisation for group accommodation in Switzerland. In 2015, it acted as the intermediary for 1.77 million overnight stays (−3.3%) by 12 335 groups at a total of 761 accommodation facilities. The increase in the average length of stay to 5 nights is very encouraging (2014: 4.8), as is the simultaneous increase in the average group size to 29 persons (2014: 28). In most regions, demand from the four main source countries (Switzerland, Germany, France and Italy) tailed off again. The Basel, Bern and Jura & Three-Lakes regions were the only ones to post more overnight stays. The number of affiliated businesses changed significantly in the following regions: Eastern Switzerland (+7) and Valais (−4). The number of beds offered increased by a total of 816.

SUPPLY AND DEMAND

Tourist region	Establishments	Beds	Groups	Arrivals	Overnight stays	Duration of stay	Group size
Valais	172	11 048	2 529	67 965	389 132	5.7	27
Graubünden	151	10 282	1 895	58 992	351 723	6	31
Bernese Oberland	122	9 001	1 793	49 935	253 962	5.1	28
Eastern Switzerland/Liechtenstein	74	4 594	1 372	38 988	171 083	4.4	28
Lucerne/Lake Lucerne	71	5 544	1 257	37 439	153 674	4.1	30
Jura & Three-Lakes	51	2 837	1 045	31 775	149 656	4.7	30
Lake Geneva Region (Vaud)	37	3 175	792	25 830	112 599	4.4	33
Ticino	25	1 134	541	11 981	55 511	4.6	22
Fribourg Region	23	1 465	506	17 807	76 951	4.3	35
Bern Region	10	621	145	3 483	12 775	3.7	24
Zurich Region	10	598	197	5 481	16 779	3.1	28
Aargau Region	9	463	158	4 827	17 038	3.5	31
Basel Region	5	312	97	2 153	9 303	4.3	22
Geneva	1	336	8	139	172	1.2	17
Total	761	51 410	12 335	356 795	1 770 358	5.0	29

Guests' Country of Origin	Groups	Arrivals	Overnight stays	Duration of stay	Group size
Switzerland	10 021	295 555	1 350 236	5.5	29
Germany	922	22 898	178 600	7.8	25
France	239	5 335	48 936	9.2	22
Others	1 153	33 007	192 586	5.8	29
Total	12 335	356 795	1 770 358	5.0	29.0

Source: CONTACT groups.ch

YOUTH HOSTELS

In 2015, youth hostels based in Switzerland recorded a total of 814 000 overnight stays or 14.4% less than during the previous year. Domestic demand was at 537 000 overnight stays, which corresponds to a decrease (-2.0%). Foreign demand generated 277 000 overnight stays or 31.3% less than in 2014. German guests accounted for the largest share of foreign demand with 76 000 overnight stays (-25.5% compared with 2014), followed by guests from the United Kingdom with 19 000 overnight stays (-48.2%) and from France with 16 000 overnight stays (-43.9%). In terms of tourist regions, Graubünden recorded the largest number of overnight stays with 138 000 units (which corresponds to a decrease of 7.6% compared with 2014), followed by the Zurich Region with 107 000 overnight stays (-11.3%) and the Bernese Oberland with 98 000 overnight stays (+2.6%). In 2015, the average duration of stay in the youth hostels was 2.0 nights at national level. Swiss guests stayed an average of 2.0 nights whereas foreign visitors stayed an average of 1.9 nights. In terms of tourist regions, the longest length of stay was registered in Graubünden with a result of 2.5 nights.

SUPPLY AND DEMAND

Tourist region	Surveyed establishments	Surveyed beds	Arrivals	Overnight stays	Average duration of stay
Graubünden	8	1 030	55 107	138 333	2.5
Zurich Region	7	735	55 503	106 600	1.9
Bernese Oberland	5	546	52 598	97 629	1.9
Eastern Switzerland	5	464	26 459	44 244	1.7
Ticino	4	596	40 627	84 545	2.1
Lake Geneva Region (Vaud)	4	550	36 254	78 880	2.2
Valais	4	509	35 456	69 800	2.0
Lucerne/Lake Lucerne	4	425	34 305	58 439	1.7
Jura & Three Lakes	3	266	x	x	x
Aargau Region	3	190	x	x	x
Basel Region	2	275	x	x	x
Bern Region	1	180	x	x	x
Fribourg Region	1	76	x	x	x
Geneva	0	0	0	0	0
Total	51	5 842	415 194	813 635	2.0

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

Source: Swiss Federal Statistical Office, Statistics on tourist accommodation

CAMPSITES

In 2015, the campsites¹ recorded 2.7 million overnight stays representing a decrease of 0.6% compared with the previous year. Swiss guests accounted for 1.8 million overnight stays, up 9.8%. Foreign guests generated 870 000 overnight stays, down 16.7%. German guests accounted for 315 000 overnight stays (–21.8% compared with 2014), which corresponds to the highest absolute result among the foreign countries. They were followed by visitors from the Netherlands with 183 000 overnight stays (–31.5%), France with 81 000 (–1.0%) and the United Kingdom with 66 000 (+3.8%). With a total of 618 000 overnight stays for 2015, Ticino ranks first among all tourist regions in terms of absolute overnight stays but, however, saw a 11.2% decrease compared with the previous year. It was followed by Valais with 362 000 overnight stays (–4.5%). For Switzerland as a whole, the average length of stay was 3.0 nights in 2015. Swiss guests spent an average of 3.3 nights on campsites while foreign guests stayed 2.7 nights. Of all tourist regions, Ticino recorded the longest average length of stay with 3.8 nights.

SUPPLY AND DEMAND

Tourist region	Surveyed establishments	Total campsites	Overnight leased campsites	Permanently leased campsites	Arrivals	Overnight stays	Average duration of stay
Valais	61	7 498	5 741	1 757	107 109	361 974	3.4
Bernese Oberland	53	4 935	3 150	1 785	94 470	268 896	2.8
Lake Geneva Region (Vaud) and Geneva ²	44	7 901	3 361	4 539	99 926	305 874	3.1
Graubünden	44	5 502	3 858	1 644	86 327	266 645	3.1
Lucerne/Lake Lucerne	39	5 108	2 339	2 769	95 200	236 906	2.5
Jura & Three-Lakes	38	5 676	2 479	3 197	59 003	183 988	3.1
Eastern Switzerland	37	4 717	1 845	2 871	64 575	159 900	2.5
Ticino	33	5 971	4 999	972	161 363	617 552	3.8
Zurich Region	23	2 786	1 281	1 505	47 451	111 954	2.4
Fribourg Region	13	2 625	710	1 915	20 298	49 870	2.5
Aargau Region	10	989	349	640	13 843	34 908	2.5
Bern Region	9	1 153	820	333	21 304	51 966	2.4
Basel Region	6	508	138	370	3 004	6 847	2.3
Total	410	55 369	31 071	24 298	873 873	2 657 280	3.0

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

In 2015, 31 000 overnight stays in holiday homes on farms were booked via the e-domizil booking platform. This figure represents 13% less overnight stays and an 8% decrease in turnover year-on-year. Not included: other accommodation categories such as 'Sleep on Straw', group accommodation and rooms, and visitors' own bookings arranged directly between the holiday guest and the provider. From summer 2016 onwards, group accommodation on farms can be booked via gruppenhaus.ch, and rooms on farms can be booked via e-domizil.

OVERNIGHT STAYS AND ESTABLISHMENTS

Tourist region	Overnight stays 2015 'Swiss Holiday Farms' ¹
Lake Geneva Region (Vaud)	5 885
Lucerne/Lake Lucerne	3 701
Valais	3 701
Fribourg Region	3 640
Jura & Three-Lakes	3 094
Eastern Switzerland	2 427
Graubünden	1 941
Ticino	1 203
Bern Region	1 699
Bernese Oberland	1 021
Zurich Region	929
Aargau Region	910
Geneva	546
Basel Region	303
Total	31 000
Number of establishments	330

¹ Data of e-domizil

Source: Agritourism Switzerland

BED AND BREAKFAST

In 2015, 168 062 guests stayed in 911 lodging facilities in Switzerland (2014: 175 102 guests and 1022 lodging facilities). A total of 396 423 overnights were recorded (2014: 422 786). Guests from Switzerland accounted for 204 000 overnights (2014: 210 644), while Europe – excluding Switzerland – represented the second largest share with 149 990 (2014: 175 384). These results will not be extrapolated and are not directly comparable to those of the preceding years because the number of lodging facilities fluctuates year-by-year (additions and deletions throughout the year). However, the adjusted figures show an increase in overnights (2014/15: +1.4%, 2013/14: +3.9%), while the average length of stay remained unchanged (2.4 nights).

SUPPLY AND DEMAND

Year	Establishments ¹	Rooms	Beds	Arrivals	Overnight stays Swiss	Overnight stays foreigners	Overnight stays total
2015	911	2 830	5 658	168 062	204 000	192 423	396 423
2014	1 022	3 094	6 208	175 102	210 644	212 142	422 786
2013	1 036	3 031	6 239	186 478	218 123	227 278	445 401
2012	988	2 903	5 965	179 792	206 338	234 723	441 061

Tourist region	Overnight stays 2015	Overnight stays 2014	Change in %
Valais	51 669	60 524	-14.63
Lucerne/Lake Lucerne	41 067	48 373	-15.10
Lake Geneva Region (Vaud)	37 855	39 777	-4.83
Aargau Region	34 230	-	-
Bernese Oberland	33 623	34 082	-1.35
Ticino	31 362	33 177	-5.47
Eastern Switzerland	31 199	33 564	-7.05
Bern Region	30 355	47 462	-36.04
Zurich Region	29 996	38 247	-21.57
Graubünden	22 615	24 995	-9.52
Jura & Three-Lakes	19 324	24 936	-22.51
Fribourg Region	15 691	19 779	-20.67
Basel Region	13 582	14 979	-9.33
Geneva	3 855	2 891	33.34
Total	396 423	422 786	-6.24

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

HOTEL AND RESTAURANT INDUSTRY

MAJOR EMPLOYER IN SWITZERLAND

209 920	employees (2014)
8 472	trainees in basic vocational education and training (2014)
28 806	hotel and restaurant establishments (2013)
26 663	VAT-taxable hotel and restaurant establishments (2013)
28.4	billion francs of VAT-taxable annual turnover in catering business and hotels (2013)
938.5	million francs paid in VAT (after pre-tax deduction) (2013)
	or
9.1	% of the overall net Federal Tax Administration (FTA) receivables (2012)

Switzerland's hotel and restaurant industry, with its 209 920 employees, is a very important employer in Switzerland. Some 5% of the country's employees work in the hotel and restaurant industry. In addition, this industry employs some 8 472 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 (2013) counts some 28 806 hotel and restaurant establishments in Switzerland. According to the survey of GastroSuisse members, 85% were restaurants and 15% were hotels. The hotel and catering industry generated a VAT-taxable annual turnover of around CHF 28.4 billion. The hotel and restaurant industry makes a substantial contribution to VAT revenues. In 2012, it paid the net sum of CHF 938.5 million in VAT. The approximately 28 806 restaurants and hotels in 2013 liable for tax thus contributed 9.1% of the overall Federal Tax Administration (FTA).

The most recent (2014) VAT statistics from the Swiss Federal Tax Administration (FTA) were not yet available when this overview of the industry was printed. Therefore, this section is based on the 2013 figures. The latest statistics from the FTA are available online at www.estv.admin.ch.

Source: GastroSuisse, Industry Report 2016

SALES DEVELOPMENT COMPARED TO SAME QUARTER OF THE PREVIOUS YEAR

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

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

1 st quarter	-5.7%	3 rd quarter	-3.4%
2 nd quarter	-3.5%	4 th quarter	-2.7%

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

In the first quarter of 2015, the hospitality industry had to accept a significant decrease in turnover due to the abolition of the franc/euro exchange rate floor. Turnover in the second and third quarters was also substantially lower than in the corresponding periods of the prior year. It was possible to curb this downtrend to some extent in the final quarter.

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

1 st quarter	-2.2%	3 rd quarter	-3.2%
2 nd quarter	-3.5%	4 th quarter	-4.9%

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

The accommodation sector experienced the first slight impact of the franc/euro exchange rate shock in March 2015. Overnight stays plummeted at this time, reducing turnover by -2.2% in the first quarter. Poor snow conditions exacerbated the already difficult situation for the accommodation sector, leading to significant loss of turnover in the final quarter of 2015. Fewer European visitors are taking holidays in Switzerland because the franc is so expensive. By contrast, demand from Asian and Arab visitors saw a sharp increase (+18.6%).

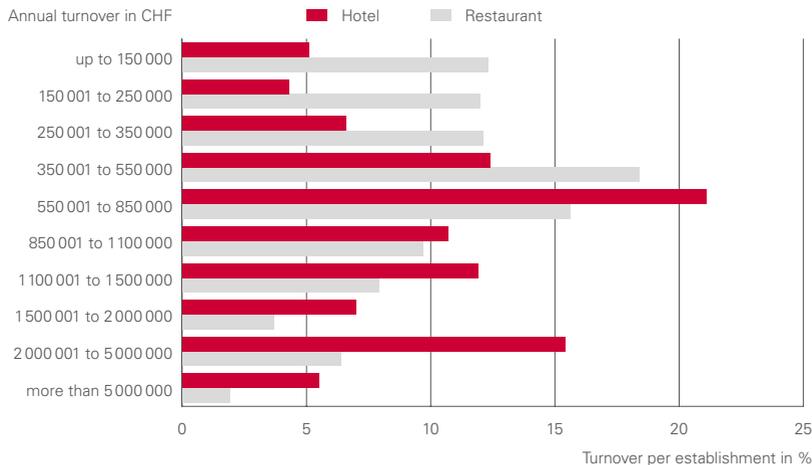
**RESTAURANTS:
CHANGE IN SALES COMPARED TO THE PRIOR YEAR**

1 st quarter	-7.0 %	3 rd quarter	-3.5 %
2 nd quarter	-3.5 %	4 th quarter	-1.5 %

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

Catering outlets were hit very hard by the abolition of the franc/euro exchange rate floor in the first quarter, and this sector posted a downturn of 7%. Good summer weather provided support for the sector in the second quarter. This slowed the pace of the downturn, resulting in a 1.5% decrease in the fourth quarter.

TURNOVER PER ESTABLISHMENT



Source: GastroSuisse, Industry Report 2016

In 2015, one entrepreneur in every three (33.2%) generated annual turnover of up to CHF 350 000. This represents a year-on-year increase of 0.6 percentage points. 17.5% of hotel and catering businesses posted turnover of between CHF 350 000 and CHF 550 000. 16.5% earned between CHF 550 000 and CHF 850 000. Almost one business in three achieved turnover in excess of CHF 850 000.

The type of business has a major influence on the level of annual turnover achieved. The lowest turnover categories (up to CHF 550 000) contain more restaurants (54.8%) than hotels (28.4%). Annual turnover of between CHF 550 001 and CHF 1 100 000 was posted by 31.8% of hotels and 25.3% of restaurants. Turnover in excess of CHF 1.1 million was earned by almost twice as many hotels (39.8%) as restaurants (19.9%).

AN OVERVIEW OF IMPORTANT KEY RATIOS FOR THE RESTAURANT INDUSTRY 2014

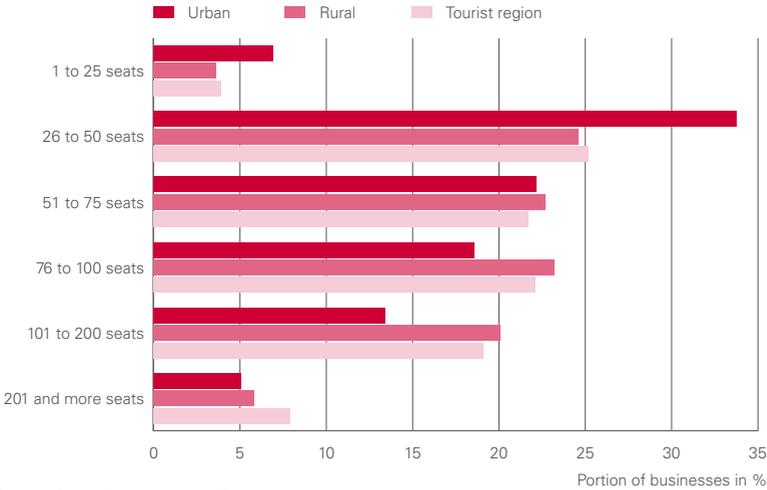
Total turnover per operating day	2 177 CHF
Total turnover per employee	102 629 CHF
Total turnover per employee and operating day	387 CHF
Turnover per restaurant per seat	8 482 CHF
Turnover per restaurant per seat and operating day	32 CHF
Turnover from food preparation per seat	5 401 CHF
Turnover from food preparation per seat and operating day	20 CHF

Source: GastroSuisse, Industry Report 2016

Turnover of CHF 2 177 was generated in an average restaurant on one business day in 2014. Each employed person generated daily turnover of CHF 387 which, when extrapolated to the whole year, represents turnover of CHF 102 629 per employed person. A restaurant generates turnover of CHF 32 per seat and business day, CHF 20 of which is accounted for by sales of items produced in the kitchen. In 2014, the average total turnover of a hotel with restaurant was CHF 4 601 per business day.

For more information, check the publication from GastroSuisse 'Branchenspiegel 2016' ('Industry Report 2016'), available from GastroSuisse (phone: 0848 377 111) for CHF 35.

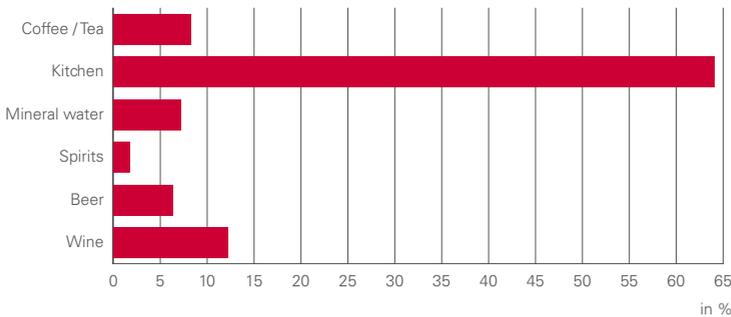
BUSINESS SIZE: NUMBER OF SEATS PER REGION



Source: GastroSuisse, Industry Report 2016

TURNOVER MIX

In 2014, 64.1% of the turnover of an average restaurant was generated by dishes ordered from the kitchen. Second place was taken by alcoholic beverages, which remained stable with 20.4% of turnover. Turnover from sales of mineral water, coffee and tea amounted to 15.5%. The quota of total turnover generated by the kitchen rose again by 1 percentage point year-on-year.



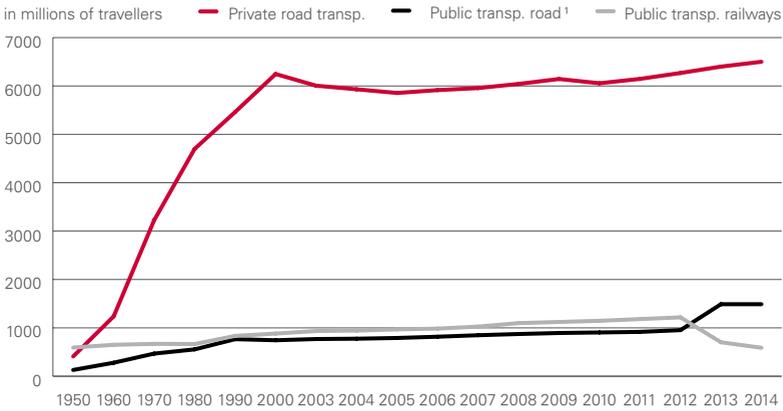
Source: GastroSuisse, Industry Report 2016

TOURISM INFRASTRUCTURE

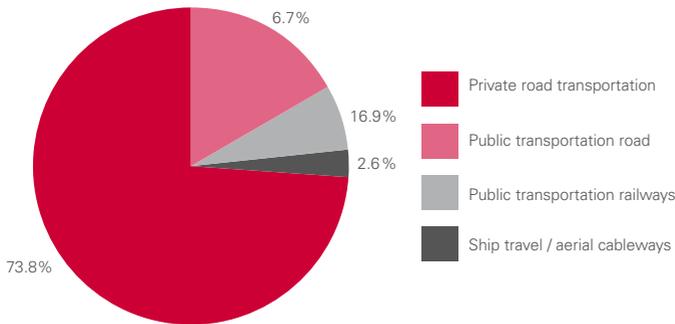
TRANSPORT

PASSENGER TRANSPORTATION

NUMBER OF PASSENGERS PER CARRIER 1950–2014



NUMBER OF PASSENGERS PER CARRIER 2014
IN % OF TOTAL TRANSPORTS



¹ From 2013 trams shall be mapped on Public transportation road.
Source: LITRA Public transport information service

PUBLIC TRANSPORT

The public transport route network on railways, roads, lakes and rivers adds up to a total of 28 737 kilometres. 25 836 stopping points are served. In 2015, 2.33 million passengers made use of a half-fare card, 460 000 persons held a general abonnement valid throughout the country and 1.3 million persons obtained a combined season ticket in one of the 19 regional tariff networks.

ONE OF THE DENSEST RAILWAY NETWORKS IN THE WORLD

The railroad network of Switzerland totals 5 304 kilometres. 3 033 kilometres are part of the Swiss Federal Railways network. From Monday to Friday, the Swiss railways (SBB) operate around 6 260 passenger trains or 407 000 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 2015, Swiss Federal Railways carried 442 million passengers. The average journey distance mounted to 41 kilometres. In addition to Swiss Federal Railways, a further 39 railway companies operate in the public transport sector, which are often referred to as private railways.

FINELY TUNED TRANSPORT NETWORK WITH BUSES, TRAMS AND THE POSTBUS

During the year 2014, 118 transport companies transported guests by tram, trolley bus and bus on a 20 733 kilometre-long network (figures include PostBus). Around 16 600 employees were necessary in order to transport the approximately 1.5 billion passengers with buses and trams.

The 877 PostBus routes operate a network of approximately 12 000 kilometres. 2 287 PostBus Switzerland Ltd. employees, with an additional 1 628 drivers from PostBus operators, conveyed almost 145 million passengers with 2 238 Postbuses. The vehicles covered an overall distance of 112.7 million kilometers.

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

NAVIGATION: ACTIVE LAKE AND RIVER CRUISING IN SWITZERLAND

In 2015 the 16 companies joined together in the Association of Swiss Navigation Companies (ASNC) transported a total of 12.3 million passengers with 148 boats. This represents an increase of 300 000 passengers compared to the prior year.

Lake Lucerne, with 2.46 million passengers, lead the ranking based on the number of passengers, followed by the Lake Geneva with 2.24 million passengers and the Lake Zurich Horgen–Meilen ferry with 2.08 million passengers and Lake Zurich (incl. Limmat River) with 1.73 million passengers.

In distance travelled, the performance rised by 19 000 kilometres 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 49 MILLION AIR PASSENGERS

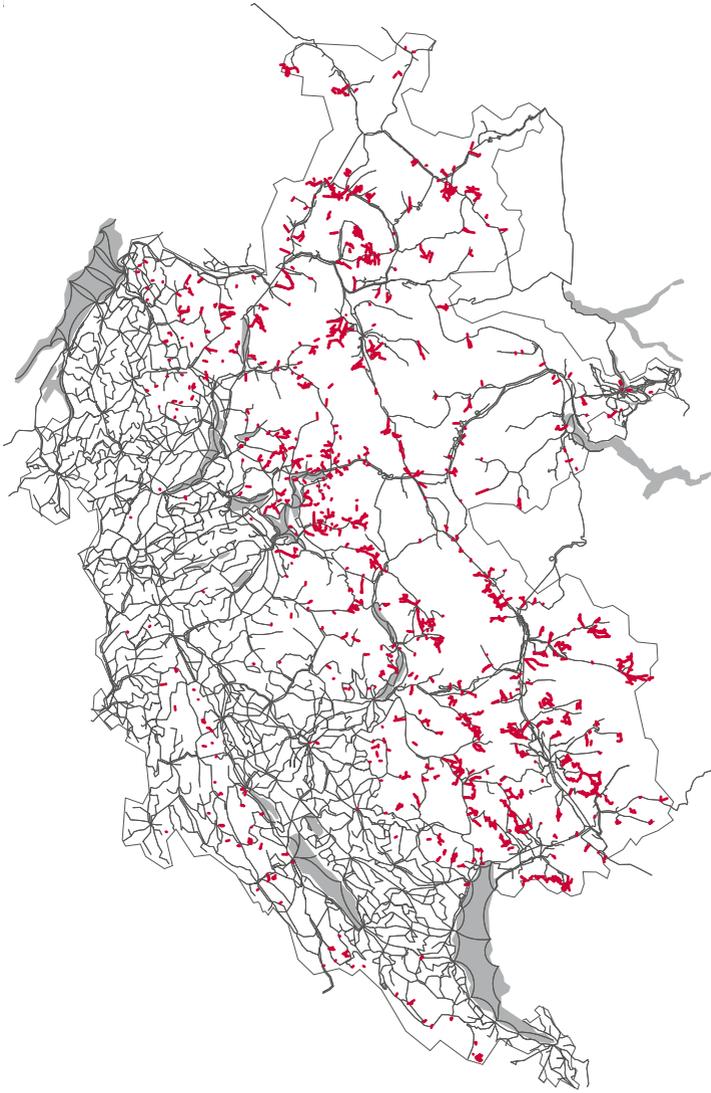
In 2015, Switzerland's airports recorded some 460 978 flight movements (take-offs and landings, only schedule and charter flights), 1.35% more than in 2014. Of the 49.47 million passengers taking off from or landing in Switzerland, about 78 525 used Switzerland as a transit station.

FLIGHT MOVEMENTS AND PASSENGERS

Airport	Movements	Local and transfer passengers	Transit passengers	Total passengers
Zurich Kloten	231 095	26 251 507	42 810	26 294 317
Genève Cointrin	146 440	156 82 128	12 475	15 694 603
Basel Mulhouse	67 814	7 028 970	23 143	7 052 113
Bern Belp	7 928	175 024	97	175 121
Lugano Agno	5 397	156 435	0	156 435
St. Gallen Altenrhein	1 732	91 976	0	91 976
Sion	572	6 660	0	6 660
Total	460 978	49 392 700	78 525	49 471 225

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

OVERVIEW OF PUBLIC TRANSPORT AND CABLEWAYS



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

Sources: Public Transport Association, Swiss Cableways

CABLEWAYS: IMPORTANT IN TERMS OF REGIONAL ECONOMICS

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

- By the end of 2015, there were 2 450 licensed facilities in Switzerland. A third of these are T-bars. Rope tows and conveyors account for another third and approximately 20% are continuously operating lifts (chairlifts, gondolas, 3-rope gondolas and funitels).
- Throughout Switzerland, cableways hire almost 3 400 full-time employees and almost 6 800 seasonal workers in transport operations alone.
- In its core business of passenger transport, Swiss cableways achieved in the 2014/15 winter season the sum of CHF 708 millions. Additional revenue of CHF 206 million was generated by the food service industry and other activities (e.g. rentals).
- The areas where visitors and locals can take advantage of the Swiss cableways spread from the Alps of canton Vaud to Eastern Switzerland and the Graubünden Alps. The cableways from Valais and Graubünden together generate almost 60% of all passenger transports' incomes in Switzerland.

CHANGE IN WINTER REVENUE IN SWITZERLAND (IN 1000)

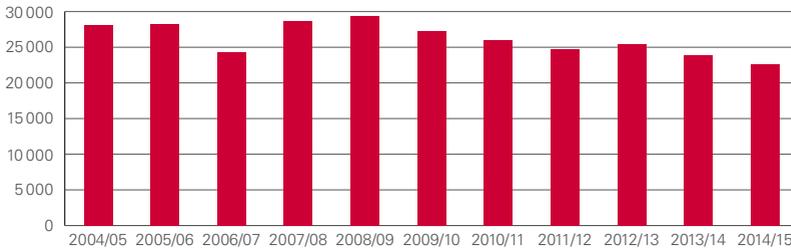


Source: Swiss Cableways (SCW), Facts and Numbers in favour of Swiss Cableways Industry 2015; Laurent Vanat, season balance 2014/15

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.

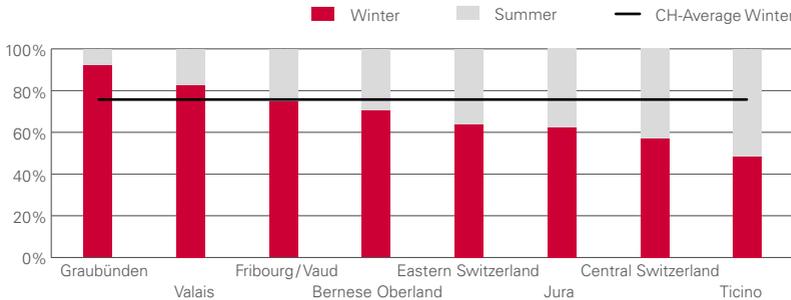
EVOLUTION OF SKIER-DAYS IN SWITZERLAND (IN 1000)



Source: Swiss Cableways (SCW), Facts and Numbers in favour of Swiss Cableways Industry 2015; Laurent Vanat, season balance 2014/15

SEASONAL DISTRIBUTION OF PASSENGER TRANSPORT INCOME

The importance of the summer season for the cableway sector varies greatly from region to region. Winter is the most important season in Graubünden with a quota of 92%, whereas summer and winter account for almost equal shares in Ticino. In Switzerland as a whole, the winter quota is 78%. Valais and Graubünden generate by far the largest income from passenger transport. In absolute figures, the 8% summer quota in Graubünden (CHF 18.3 million) still represents significantly more income than the 52% summer quota in Ticino (CHF 6.3 million).



Source: Swiss Cableways (SCW), Facts and Numbers in favour of Swiss Cableways Industry 2015

SWITZERLANDMOBILITY

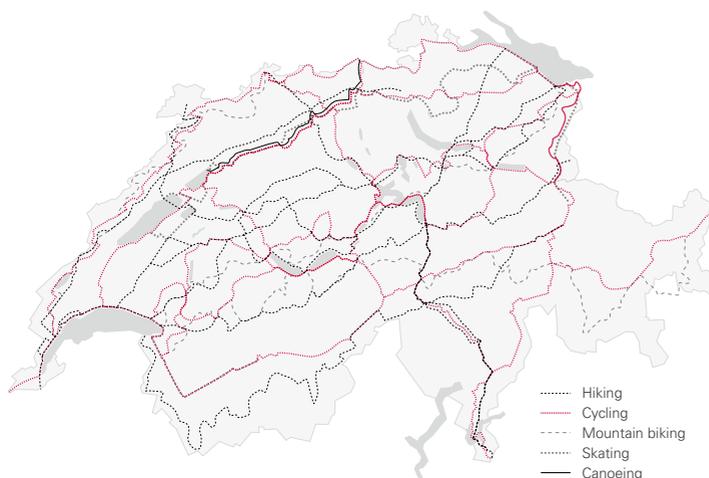
SwitzerlandMobility is the national network of non-motorized traffic for leisure and tourism focusing on the development and communication of the most attractive hiking, cycling, mountain biking, skating, and canoeing routes in Switzerland. SwitzerlandMobility links these routes with public transportation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

SWITZERLANDMOBILITY ROUTE NETWORK

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

Status as of 31.12.2015

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 8.5 million in 2015. In 2011 the LINK-Institute found that about 2 million people, or 24% of the Swiss population, are familiar with Switzerland-Mobility.

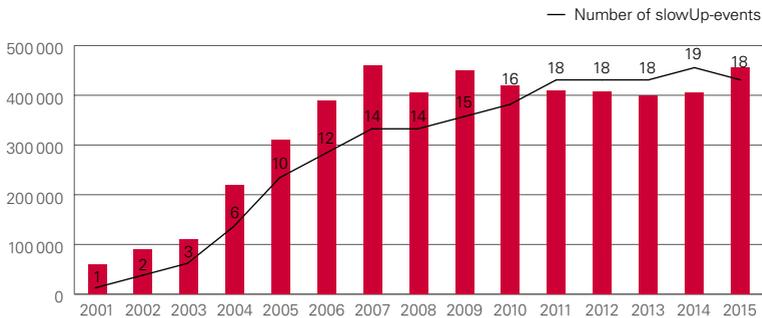
	Swiss users	Foreign visitors	Turnover from Swiss users (in CHF)	Turnover from foreign users (in CHF)	Total turnover (in CHF)
Hiking	920 000	101 000	270 million	30 million	300 million
Cycling	750 000	75 000	290 million	65 million	355 million
Mountain biking	160 000	16 000	65 million	10 million	75 million
Total	1 830 000	192 000	625 million	105 million	680 million

Source: SwitzerlandMobility, surveys on usage in 2013

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 2001–2015



Participants:

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

Source: SwitzerlandMobility

SWISS HIKING TRAILS

Switzerland offers hikers an attractive and extensive network of hiking trails covering more than 65 000 kilometres – an offering unrivalled by any other country in the world. Swiss hiking trails are legally protected and they feature signage compliant with official standards. The ‘Swiss Hiking Trail Federation’ is the umbrella organisation for the 26 cantonal hiking trail organisations. Together, they promote hiking, support attractive hiking trail projects and represent hikers’ interests at the political level. The umbrella federation also supports the cantonal organisations and their members, who number approximately 45 000; it is responsible for fund-raising at national level, and it publishes the WANDERN. CH magazine. On its services website, the Swiss Hiking Trail Federation posts a vast range of fascinating background reports, tips and hints on hiking, and a database containing over 500 suggestions for hiking throughout Switzerland: www.wandern.ch.

NETWORK OF HIKING TRAILS PER REGION

Region ¹	Total network of walks (km)	Paved walks (km)	Mountain walks (km)
Eastern Switzerland	19 508	4 101	11 169
Schweizer Mittelland	15 273	4 660	2 640
Lake Geneva Region	12 279	2 761	3 425
Central Switzerland	8 247	2 172	3 068
Ticino	4 352	612	3 405
Zurich	3 037	1 031	12
North-West Switzerland	2 762	961	7
Total	65 458	16 298	23 726

¹ Official FSO main regions of Switzerland

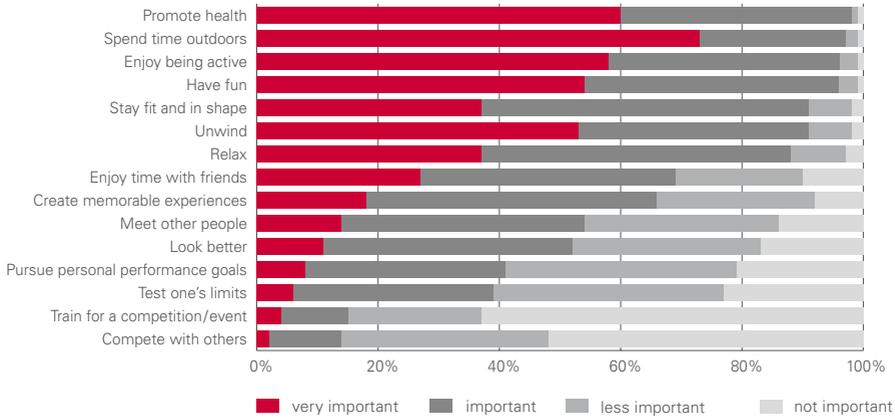
Source: Swiss Hiking

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

- Hiking is the most popular leisure and sporting activity in Switzerland: almost half of the population aged 15 to 74 state that they are active hikers/mountain hikers. This figure translates into 2.7 million Swiss hikers in addition to 300,000 tourists from abroad.
- The popularity of hiking has continued to increase in recent years: Switzerland has 7% more hikers today than in 2008.
- On average, each hiker takes 20 hikes of various lengths per year, with an average hiking time of three hours. Spread over a full year, this results in about 60 hours of hiking for a typical hiker. Three quarters of hikers also hike during the winter months.

- The average spend per person and day during a hike in Switzerland is CHF 45 or CHF 860 per year. Therefore, revenue generated by hikers amounts to approximately CHF 2.8 billion, broken down as follows: travel to and from the destination (approx. CHF 750 million), public transportation used along the way (approx. CHF 160 million), meals (approx. CHF 950 million), overnight accommodation (approx. CHF 420 million), equipment (approx. CHF 490 million), and miscellaneous (approx. CHF 40 million).
- Hikers are by no means the only users of hiking trails: overall, about 80% of the Swiss population make use of signed hiking trails.
- Signposts and trail markers are the most important forms of navigation support along the way.

IMPORTANCE OF VARIOUS REASONS FOR HIKING



Source: 'Sport Schweiz 2014' study, number of respondents: 10652, of which 3665 hikers (recognized athletes only)

HIKERS ARE SATISFIED WITH THE OFFER

Of particular importance to hikers are the attractive scenery along the trails, the experience of nature and the opportunity to unwind while hiking. In terms of infrastructure, end-to-end trail signage (including information on hiking times at regular intervals), unpaved (natural) paths, and varied, well maintained trails are rated as very important by hikers. More than 60% also consider restaurants, inns and public transportation to the trails to be important or very important. Most hikers are very satisfied with the above-mentioned aspects.

Source: Swiss Hiking

SWISS PARKS

The park environment in Switzerland has taken shape. Following the dynamic developments of the past eight years, the latest map (updated January 2016) includes 20 parks and park projects, representing more than 15% of the area of Switzerland in 13 different cantons.

The Swiss National Park in the Engadine is the best-known park in the country. It was established over 100 years ago as the first national park in the Alpine region, and it has its own legal basis. Two other national park projects are seeking to obtain the national label: Parc Adula (Graubünden/Ticino) and Parco Nazionale del Locarnese (Ticino).

In addition to the national parks, Switzerland has 14 regional nature parks and one nature discovery park, all nationally recognised according to the Federal Act on the Protection of Nature and Cultural Heritage (NCHA) of 2007. One other nature park is in the development phase (candidate): the Schaffhausen Regional Nature Park (Canton of Schaffhausen), and work is in progress on a new nature discovery park in the Jorat region (Vaud). The perimeters of the candidates have not yet been finalised. The local population will decide in the next few years whether their municipalities will definitely participate in the parks.

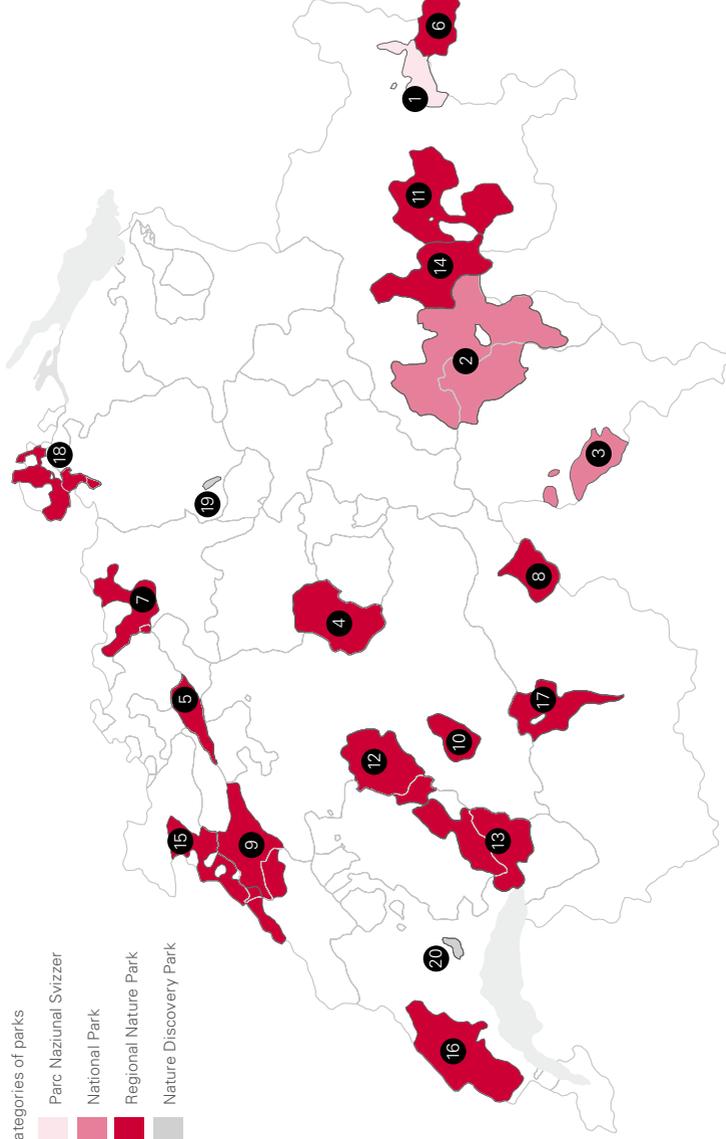
Swiss park policy has been a success story. Regional nature parks have sprung up in all areas of the country. They have become pillars of long-term regional growth, creating added value for the nature and the countryside, for society and the regional economy – with tourism and regional products as the main economic beneficiaries. The national and nature discovery parks focus on conservation of nature and the countryside, with particular emphasis on natural processes (core zones). By providing the basis for experiences of nature, these parks also attract tourism.

In 2016, the Swiss Parks won the Tourism For Tomorrow Award, an international prize for sustainable tourism. Thanks to its parks, Switzerland was thus honoured as one of the world's most sustainable destinations.

Studies on 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 visitors make their journeys because of the Biosphere Entlebuch, while as many as 36% travel on account of the Swiss National Park. They generate total added value of CHF 6 million for the Entlebuch region and CHF 20 million for the Swiss National Park region, corresponding to six times the amount of the public funds invested (at federal, cantonal and municipal levels).

SWISS PARKS

Categories of parks



1 Parc Nazional Swizzer | 2 Parc Aduja* | 3 Progetto Parco Nazionale del Locarnese* | 4 UNESCO Biosphère Entlebuch | 5 Naturpark Thal | 6 Biosfera Val Müstair | 7 Jurapark Aargau |
 8 Landschaftspark Binntal | 9 Parc régional Chasseral | 10 Naturpark Diemtigtal | 11 Parc Ela | 12 Naturpark Gantrisch | 13 Parc naturel régional Gruyère Pays-d'Enhaut |
 14 Naturpark Beverin | 15 Parc du Doubs | 16 Parc Jura vaudois | 17 Naturpark Plyn-Finges | 18 Naturpark Schaffhausen** | 19 Wildnispark Zürich Sihlwald |
 20 Parc naturel pérurbain du Jorat***

* Candidate National Park ** Candidate Regional Nature Park *** Candidate Nature Discovery Park

© Competence Center for Geoinformation, Swiss Parks Network
 Source: Federal Office of Topography

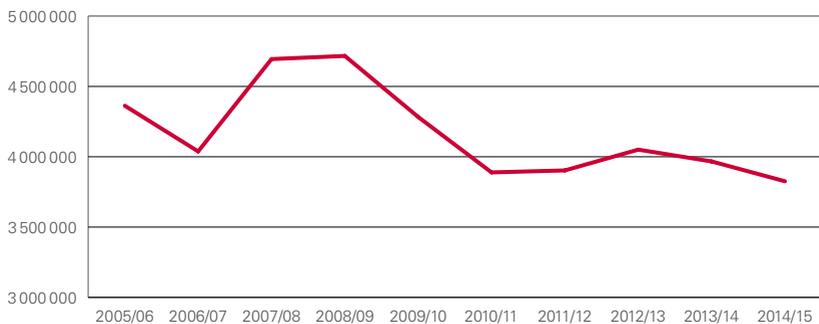
Status as of January 2016

SWISS SKI SCHOOLS

In 152 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 LESSONS SOLD BY SWISS SKI SCHOOLS¹

Sold lessons



¹ Status as of 30.06.2015

Source: SWISS SNOWSPORTS

Because of a system change in data entries, Swiss Snowsports is currently unable to provide accurate figures for the season 2015/2016. Up-to-date figures for the season 2015/2016 will be available at www.snowsports.ch as of August 2016. These will additionally be published in the annual report.

FORMAL EDUCATION

BASIC VOCATIONAL EDUCATION AND TRAINING

ADVANCED FEDERAL CERTIFICATE (AFC)

Hotel and restaurant	Certificates of qualification issued		Apprentices hired	
	2015	2014	2015	2014
Hotel- und Gastrofachmann /-frau	18	24	18	22
Hotelfachmann/-frau EFZ	306	323	328	348
Koch/Köchin EFZ	1 537	1 567	1 750	1 772
Restaurationsfachmann/-frau EFZ	603	594	589	579
Systemgastronomiefachmann/-frau EFZ	–	–	58	–

Transport services

Matrose/Matrosin der Binnenschifffahrt EFZ	13	9	13	15
Seilbahn-Mechatroniker/-in EFZ	28	21	30	31
Fachmann/-frau öffentlicher Verkehr EFZ	–	–	34	–

Economy and administration

Kaufmann/-frau B EFZ				
Hotel-Gastro-Tourismus	46	21	10	7
Öffentlicher Verkehr	23	18	3	0
Reisebüro	8	9	3	7
Transport	12	10	11	4
Kaufmann/-frau E EFZ				
Hotel-Gastro-Tourismus	201	196	165	149
Öffentlicher Verkehr	291	261	342	336
Reisebüro	174	171	149	171
Transport	24	26	35	29

BASIC FEDERAL CERTIFICATE (BFC)

Hotel and restaurant

Hotellerieangestellte/-r EBA	30	37	25	25
Küchenangestellte/-r EBA	289	272	340	367
Restaurationsangestellte/-r EBA	104	106	128	124
Seilbahner/-in EBA	8	3	6	5

Source: Swiss Federal Statistical Office

HIGHER VOCATIONAL EDUCATION AND TRAINING: FINAL EXAMS

FEDERAL CERTIFICATES	Men	2015 Women	Total	2014 Total	2013 Total
Bereichsleiter/-in Hotellerie-Hauswirtschaft	6	66	72	81	74
Bereichsleiter/-in Restauration	4	27	31	30	30
Bergführer/-in	22	1	23	20	25
Cabin Crew Member	9	38	47	60	47
Chef de Réception	0	0	0	13	14
Chefkoch/Chefköchin	89	22	111	132	98
Fachmann/-frau im Pisten und Rettungsdienst	24	1	25	0	2
Gastro-Betriebsleiter/-in	49	28	77	68	62
Schneesportlehrer/-in	92	22	114	133	121
Seilbahnfachmann/-frau	12	0	12	41	–
Tourismus-Assistent/-in	6	38	44	34	47
Wanderleiter/-in	2	3	5	46	22

FEDERAL DIPLOMAS

Manager/-in öffentlicher Verkehr	0	0	0	17	15
Gastro-Unternehmer/-in	12	5	17	12	13
Küchenchef/-in	4	0	4	31	6
Leiter/-in Gemeinschaftsgastronomie	1	0	1	7	–
Leiter/-in Hotellerie – Hauswirtschaft	0	0	0	3	–
Restaurationsleiter/-in	0	0	0	4	1
Manager/-in Gesundheitstourismus und Bewegung	1	0	1	10	–
Seilbahnmanager/-in	3	0	3	–	–

DIPLOMA OF COLLEGES

Hauswirtschaftliche Betriebsleitung	2	31	33	23	31
Hotellerie + Gastronomie	172	245	417	462	436
Tourismus	39	134	173	206	220

DIPLOMA OF UNIVERSITIES OF APPLIED SERVICES¹	Men	2014 Women	Total	2013 Total	2012 Total
Hotel sector – Certificates issued	216	288	504	450	383
Tourism sector (since 2008 Bachelor) – Certificates issued	31	133	164	200	173

¹ The figures for 2015 from the universities of applied services were not available at the time of printing.

INTERNATIONAL

TOURIST ARRIVALS

International tourist arrivals grew by 4.4% in 2015 to reach a total of 1,184 million in 2015, according to the latest UNWTO World Tourism Barometer. Some 50 million more tourists (overnight visitors) travelled to international destinations around the world last year as compared to 2014.

By region, Europe, the Americas and Asia and the Pacific all recorded around 5% growth in 2015. Arrivals to the Middle East increased by 3% while in Africa, limited data available, points to an estimated 3% decrease, mostly due to weak results in North Africa, which accounts for over one third of arrivals in the region.

	International arrivals in million		Change in %	
	2015 ¹	2014	2015 ¹ /14	2014/13
Europe	609.1	580.3	5.0	2.4
Northern Europe	75.3	70.8	6.3	5.3
Western Europe	180.9	174.5	3.7	2.2
Central/Eastern Europe	127.8	120.1	6.4	-6.0
Southern/Mediterranean	225.1	214.9	4.8	6.9
Asia and Pacific	277.0	264.4	4.8	5.8
North-East Asia	142.3	136.3	4.4	7.3
South-East Asia	102.2	97.3	5.1	3.0
Oceania	14.2	13.2	7.3	6.0
South Asia	18.3	17.6	4.2	10.1
Americas	190.7	181.7	4.9	8.4
North America	126.2	120.9	4.4	9.7
Caribbean	23.8	22.2	7.4	5.0
Central America	10.3	9.6	7.1	5.6
South America	30.3	29.1	4.3	7.1
Africa	53.1	54.9	-3.3	0.3
North Africa	18.8	20.4	-7.8	-1.4
Subsaharan Africa	34.2	34.4	-0.6	1.4
Middle East	54.1	52.4	3.1	6.7
World	1 184.0	1 134.0	4.4	4.2

¹ Estimate

Source: World Tourism Organization (UNWTO)

TOP DESTINATIONS

Rank	Country of destination	International arrivals in million		Change in %	
		2014	2013	2014 ¹ /13	2013/12
1	France	83.8	83.6	0.2	2.0
2	United States	75.0	70.0	7.2	5.0
3	Spain	65.0	60.7	7.1	5.6
4	China	55.6	55.7	-0.1	-3.5
5	Italy	48.6	47.7	1.8	2.9
6	Turkey	39.8	37.8	5.3	5.9
7	Germany	33.0	31.5	4.6	3.7
8	United Kingdom	32.6	31.1	5.0	6.1
9	Russia	29.8	28.4	5.3	10.2
10	Mexico	29.3	24.2	21.5	3.2
37	Switzerland	9.2	9.0	2.1	4.7

Rank	Country of destination	International tourism receipts in billion US-\$		Change in % based on local currency	
		2014	2013	2014 ¹ /13	2013/12
1	United States	177.2	172.9	2.5	7.0
2	Spain	65.1	62.6	3.9	4.2
3	France	57.4	56.6	1.5	2.0
4	China	56.9	51.7	10.2	3.3
5	Macao (China)	50.8	51.8	-1.9	18.1
6	United Kingdom	46.6	41.8	6.1	15.2
7	Italy	45.5	43.9	3.7	3.1
8	Germany	43.3	41.3	4.9	4.7
9	Thailand	38.4	41.8	-2.7	22.1
10	Hong Kong (China)	38.4	38.9	-1.5	17.7
21	Switzerland	17.4	16.8	2.7	3.0

¹ Estimate

Source: World Tourism Organization (UNWTO)

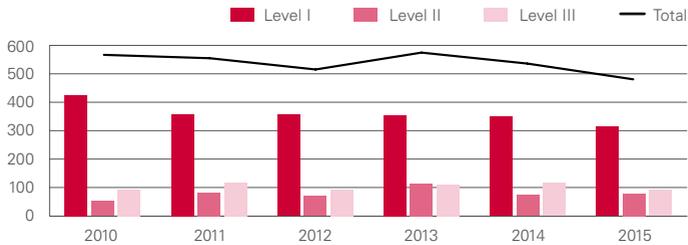
QUALITY PROMOTION

QUALITY PROGRAMME OF SWISS TOURISM



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

QUALITY LABELS AWARDED

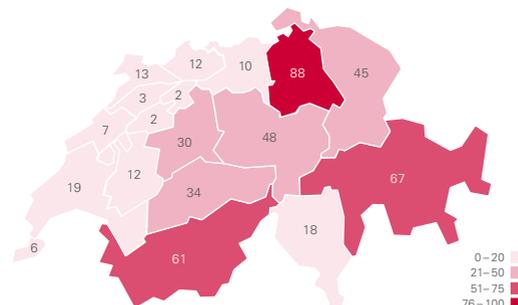


Since 1998 a total of 11 615 individuals have been trained and 8 149 quality labels have been awarded. As compared to 2014, Valais marks the largest increase in current Q-labels (+5.9%). With a plus of 5% the tourism organisations show the biggest increase within Switzerland.

LABELS PER INDUSTRY

Industry	Labels	in %	Industry	Labels	in %
Hotel industry	184	38.10	Supplementary accommodation	47	9.73
Gastronomy	77	15.94	Snow schools	24	4.97
Tourism organisations	61	12.63	Other	90	18.63
Total			Total	483	100.00

LABELS PER REGION



FAMILY DESTINATION / WELLNESS DESTINATION



Since 1996 Swiss holiday destinations addressing their services to the needs and wishes of families can apply for the Family Destination quality label. In 2015, 21 destinations were bearing the label.



Since 2008 the Swiss Tourism Federation has been awarding a Wellness Destination quality label to Swiss holiday destinations specialising in wellness services. In 2015 this quality label was awarded to 9 destinations.

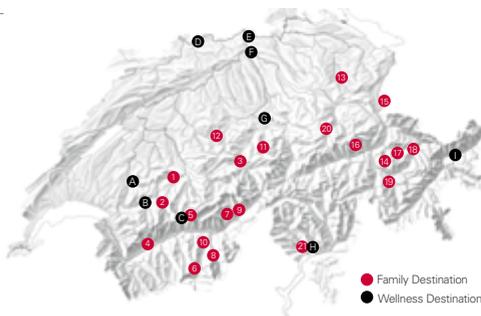
DESTINATIONS CARRYING THE LABEL

FAMILY DESTINATION 2013–2015

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

WELLNESS DESTINATION 2015–2017

Fribourg Region	A Charmey	Zurich Region	F City of Baden
Bernese Oberland	B Gstaad Saanenland	Lucerne/Lake Lucerne	G Weggis Vitznau Rigi
Valais	C Leukerbad	Ticino	H Ascona–Locarno
Aargau Region	D Rheinfelden	Graubünden	I Engadin Scuol
	E Bad Zurzach		

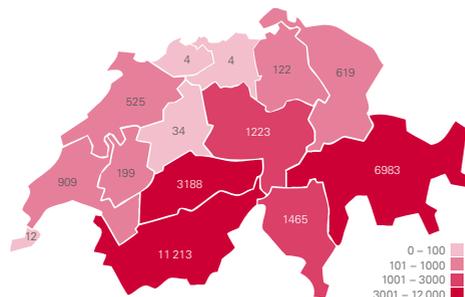




CLASSIFICATION OF HOLIDAY APARTMENTS AND GUEST ROOMS

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

AWARDED CERTIFICATES 2015



A detailed overview of the regional distribution is found on page 23 of this brochure.
Source: Swiss Tourism Federation

OTHER LABELS



IBEX FAIRSTAY

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

Year	2015	2014	2013	2012	2011
Certified companies	57	55	53	59	61

Source: ibex fairstay



SAFETY IN ADVENTURES

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

Year	2015	2014	2013	2012	2011
Certified companies	45	41	44	46	46

Source: Safety in Adventures



EU ENVIRONMENTAL LABEL FOR LODGING ESTABLISHMENTS

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

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

Year	2015	2014	2013	2012	2011
Certified companies	49	56	56	52	45

Source: SALADINO Umweltprojekte

TOURISM ASSOCIATIONS AND INSTITUTIONS

Tourism interest groups and professional associations

Agritourism Switzerland

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

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

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

Association of Swiss Tourism Managers (ASTM)

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

Association of the Swiss Navigation Companies

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

Bed and Breakfast Switzerland

Sonnenweg 3, 4144 Arlesheim, phone +41 (0)61 703 00 83, fax +41 (0)61 703 96 76, www.bnb.ch, admin@bnb.ch.
Organisation of Swiss BnB host families. Information, promotion (internet/app), quality assurance, official institution for the classification of all Swiss BnBs.

Community of Interest of the Higher Schools of Tourism Management Switzerland

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

CONTACT groups.ch – Hotels and Holiday Homes for Groups

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

GastroSuisse

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

hotelleriesuisse

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

Hotel & Gastro Union

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

Interhome AG

Sägereistrasse 27, 8152 Glattbrugg, phone +41 (0)43 810 91 91, www.interhome.ch/en, info@interhome.ch.

Rental specialist for individual holiday houses and apartments in the most popular regions in Switzerland and internationally. Interhome's services include the management of the properties as well as the handling of the complete booking process and fulfillment while ensuring high quality standards.

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 Camping.

SNOW SPORT INITIATIVE SWITZERLAND

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

Swiss Association of Public Transport

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

Protection of interests. Promotion of collaboration amongst the members. Information and consultation activities. Professional formation and further education.

Swiss Cableways

Dählhölzliweg 12, 3000 Bern 6, phone +41 (0)31 359 23 33, fax +41 (0)31 359 23 10, www.seilbahnen.org, info@seilbahnen.org.

Representation of the common interests of the cableways 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 Hiking Trail Federation

Monbijoustrasse 61, P.O. Box, 3000 Bern, phone +41 (0)31 370 10 20, fax +41 (0)31 370 10 21, www.wandern.ch, info@wandern.ch.

Umbrella organisation of 26 cantonal hiking associations. Promotes hiking trails and hiking in Switzerland.

Swiss Hostels

Alpenstrasse 16, 3800 Interlaken, phone +41 (0)33 823 46 46, fax +41 (0)33 823 46 47, www.swisshostels.com, info@swisshostels.com.

Industry organisation for independent hostels in Switzerland. Joint marketing, joint purchase, network and exchange, and strengthen the position of Swiss Hostels in the Swiss accommodation industry.

Swiss Parks Network

Monbijoustrasse 61, 3007 Bern, phone +41 (0)31 381 10 71, info@paerke.ch, www.paerke.ch/en.

The Network is the umbrella organisation of all Swiss parks which administers the interests of its members and assists them in establishing and operating the parks, as well as in ensuring their quality in the long-term. The 20 parks characterize themselves by their natural and cultural landscapes. They are engaged to protect and to valorize them.

SWISS SNOWSPORTS

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

Swiss Tourism Federation (STF)

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

Swiss Travel Savings Fund (Reka) Cooperative

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

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

Swiss Youth Hostels (SYH)

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

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 thermal spas, convalescent homes, clinics of rehabilitation and health hotels.

Touring Club Switzerland (TCS)

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

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

Public corporations

Swiss Association for Hotel Credit (SGH)

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

Financing, appraisals, consulting.

Switzerland Tourism (ST)

Tödistrasse 7, 8027 Zurich, phone +41 (0)44 288 11 11, fax +41 (0)44 288 12 05, www.MySwitzerland.com, info@myswitzerland.com.

Offices in 26 countries. Increase the demand for Switzerland as a travel, holiday and congress destination.

Federal institutes

State Secretariat for Economic Affairs SECO

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

Institutes of higher education

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

Dufourstrasse 40a, 9000 St. Gall, phone +41 (0)71 224 25 25, fax +41 (0)71 224 25 36, www.imp.unisg.ch.
University lecturing, research, market research, consulting and expertising in the competence fields of tourism and transportation, regional science, 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 16, 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 consultancy, taking into account sustainable development in the areas of destination management and development, tourist infrastructure and e-tourism.

Research Unit Tourism (CRED-T) in the Center for Regional Economic Development, University of Bern

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

International Tourism Organisations

European Travel Commission (ETC)

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

EUROSTAT

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

Hotels, Restaurants & Cafés in Europe (HOTREC)

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

World Tourism Organization (UNWTO)

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