

STV  **FST**

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

SWISS TOURISM IN FIGURES 2018

STRUCTURE AND INDUSTRY DATA

PARTNERSHIP. POLITICS. QUALITY.



QUALITY
Our Passion



FAMILY
Destination



WELLNESS
Destination



APARTMENT
Holiday Comfort

Edited by

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In cooperation with

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AT A GLANCE

CHF 44.7 billion¹

total revenue generated by Swiss tourism

28 555 km public transportation network

25 497 train stations and stops

57 554 795 air passengers

471 872 flights

CHF 18.7 billion¹

gross value added

28 985 hotel and restaurant establishments

7845 trainees

CHF 16.6 billion²

revenue from foreign tourists in Switzerland

CHF 17.9 billion²

outlays by Swiss tourists abroad

175 489 full-time equivalents¹

38 806 777 hotel overnight stays

average stay = 2.0 nights

4765 hotels and health establishments

274 792 hotel beds

One of the largest export industries in Switzerland

4.4 % of export revenue

¹ Swiss Federal Statistical Office, Annual indicators of the Tourism Satellite Account TSA 2017 (first estimate)

² Swiss Federal Statistical Office, Tourism Balance of Payments 2018

Sources: Swiss Federal Statistical Office, Public Transport Association, 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 January 2017 (SR 935.22)

PROMOTION OF THE HOTEL INDUSTRY

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

REGIONAL POLICY

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

CASINOS

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

TEMPORARY SPECIAL RATE FOR ACCOMMODATION SERVICES

Federal Act on Value Added Tax of 12 June 2009, Status as of 1 January 2018 (SR 641.20)

TOURISM STATISTICS

Ordinance on the Conduct of Federal Statistical Surveys of 30 June 1993,
Status as of 1 March 2018 (SR 431.012.1)

NATURE PARKS

Federal Act on the Protection of Nature and Cultural Heritage of 1 July 1966,
Status as of 1 January 2017 (SR 451)

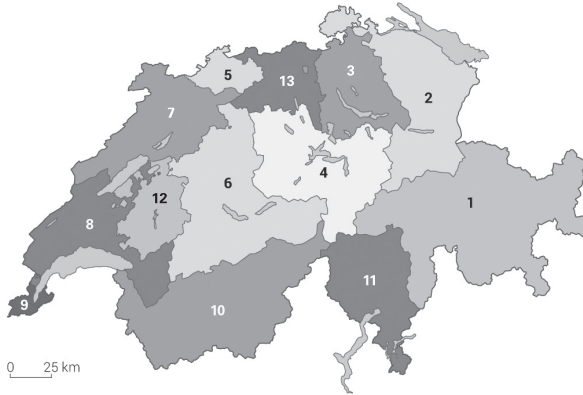
CABLECARS AND CHAIRLIFTS

Federal Act on Cableways for Passenger Transport of 23 June 2006, Status as of 1 January 2018
(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 13 June 2016
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 1 May 2018
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	Promotion of Tourism Act of 16 December 2015
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	Promotion of Tourism Act of 15 May 2017
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 2018

- 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 Canton St. Gallen (excluding parts of the district of See-Gaster)

- 3 **Zurich Region:** Cantons of Zurich and Zug; Canton of Aargau: commune of Baden; Canton of Schwyz: district of Höfe and part of district of March; Canton of St. Gallen: part of See-Gaster district; Canton of Schaffhausen: part of district of Schaffhausen

- 4 **Lucerne / Lake Lucerne:** Cantons of Lucerne, 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

- 6 **Bern Region:** Canton of Bern: districts of Emmental, Oberaargau, Bern-Mittelland, Frutigen-Niedersimmental, Interlaken-Oberhasli, Obersimmental-Saanen and Thun

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

- 8 **Lake Geneva (Vaud):** Canton of Vaud

- 9 **Geneva:** Canton of Geneva

- 10 **Valais:** Canton of Valais

- 11 **Ticino:** Canton of Ticino

- 12 **Fribourg Region:** Canton of Fribourg

- 13 **Aargau Region:** Canton of Aargau (without commune Baden); Canton of Solothurn: districts of Olten, Gösgen and 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 44.7 billion in 2017, 25.2 billion or almost 56.5% came from tourist accommodation, meals and passenger transportation. These three tourism products are responsible for 62.3% 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 2017, approximately 4.4% of Switzerland's export revenue (goods without nonmonetary gold and services) come from tourism.¹

EXPORT REVENUE

Industry	2018 CHF bn	2017 CHF bn	2016 CHF bn	2015 CHF bn	2014 CHF bn
Pharmaceutical and chemical industry	104.4	98.6	94.3	84.7	85.3
Metal and machine industry	64.7	61.3	58.2	57.3	60.5
Merchanting ²	33.4	27.6	25.3	25.0	26.5
Financial services ²	21.3	20.0	19.5	19.9	20.1
Watchmaking industry	21.2	19.9	19.4	21.5	22.3
Tourism (Tourism Balance of Payments)	16.6	16.2	15.8	15.8	16.3

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 (international air travel and 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 13 June 2019).

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		
	2018 ²	2017 ¹	2016 ¹	2018 ²	2017 ¹	2016 ¹
Tourism, including overnight stays	11.0	10.7	10.4	12.6	12.3	11.8
Visitors staying in lodging facilities and with relatives	8.0	7.7	7.4			
Educational & medical stays	3.0	3.0	3.0			
Excursionists, transit visitors, other tourism	2.9	2.9	2.8	5.3	5.3	4.4
Consumption expenditure of border workers incl. short-term residents (< 4 months)	2.7	2.6	2.6			
Total	16.6	16.2	15.8	17.9	17.6	16.2

¹ Revised figures

² Provisional figures

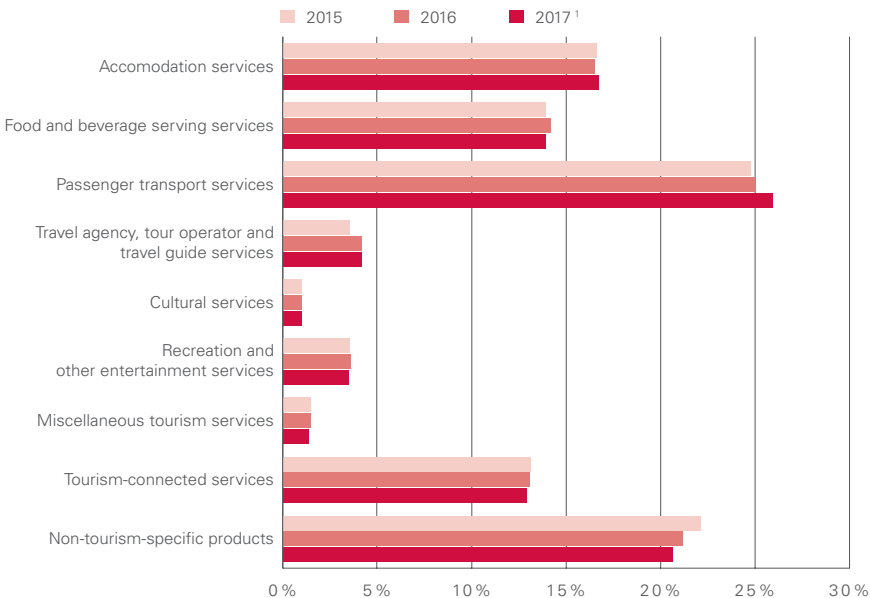
Source: Swiss Federal Statistical Office, Tourism Balance of Payments

THE TOURISM SATELLITE ACCOUNT

INCREASE IN OVERALL TOURISM DEMAND

Overall tourism demand rose considerably in 2017 (+2.1%) after performing moderately in the previous year (2016: +1.1%). Thus, a slight growth was observed for most products in 2017, leading to an increase in the overall tourism demand to a total of CHF 44.652 billion. The increase in accommodation services (+3.3%) is noteworthy, whereby the rise in the food and beverages serving services (+0.5%) remains stable over time. The increase among passenger services was 5.8% and among tourism-connected products 0.8%. The decrease in non-tourism-specific products amounted to 0.5%.

SHARES OF THE TOURISM INDUSTRY IN SWITZERLAND



¹ First Estimate

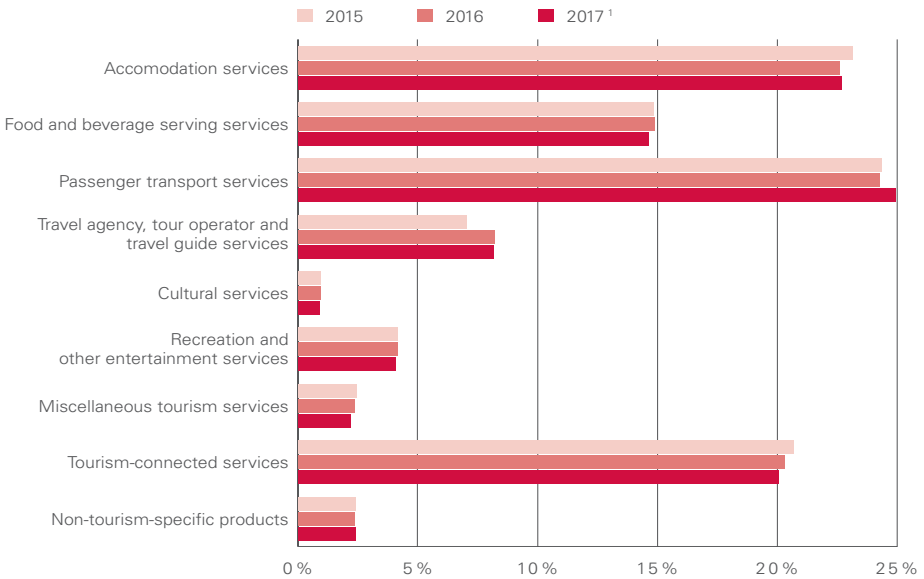
Source: Swiss Federal Statistical Office, Annual indicators of the Tourism Satellite Account

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 INCREASE OF THE GROSS VALUE ADDED

In 2017, the total gross value added by tourism increased (+2.2%). Overall, this amounted to CHF 18.654 billion. Almost all products registered a positive increase in gross value added. The rise topped 2.8% for the accommodation category, 0.5% for the food and beverages serving services category and 5.0% for the passenger services category. Growth for tourism-connected products was 1.0%.

SHARE OF TOURISM GROSS VALUE ADDED ACCORDING TO PRODUCTS



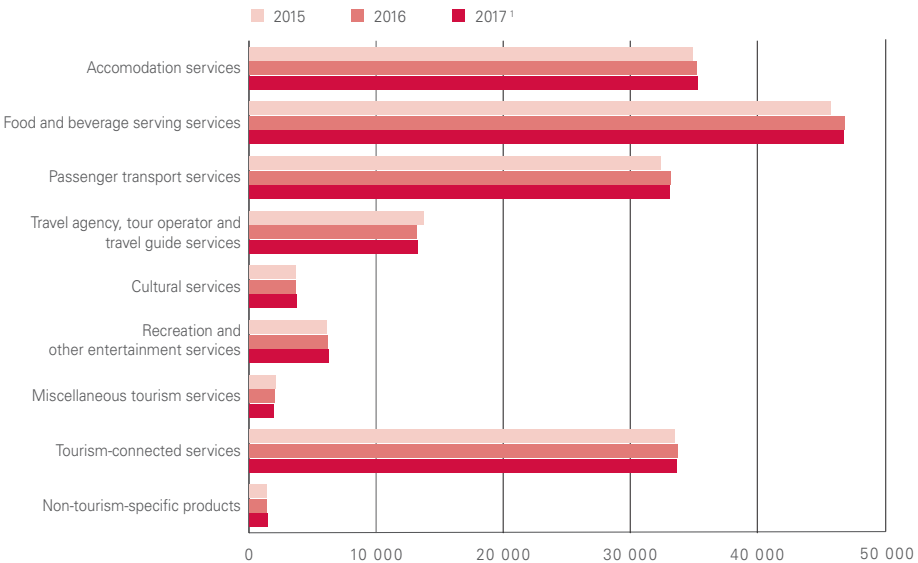
¹ First Estimate

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

THE TOURISM SATELLITE ACCOUNT STABLE TOURISM EMPLOYMENT

Although a sharp increase was registered for both the overall tourism demand and the gross value added, tourism employment in full-time equivalents remained stable in 2017 (0.0%) with 175 489 full-time equivalents. There has been a rise by the accommodation category (+0.2%), the travel services category (+1.0%), the culture category (+1.9%) and the sport and entertainment category (+1.7%). In contrast, the evolution in the passengers services category (-0.1%), the food and beverages serving services category (-0.3%) and other services category (-3.9%) has been negative, so that overall tourism employment has remained stable.

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)

		2018	2017	2016	2015	2014	2013
Service industry	Total	2935.7	2880.3	2854.0	2833.1	2800.4	2773.0
	Men	1582.3	1549.1	1538.1	1532.5	1519.8	1508.3
	Women	1353.4	1331.2	1315.8	1300.7	1280.6	1264.6
Accommodation	Total	63.4	62.8	63.2	63.6	65.4	65.9
	Men	30.4	29.9	30.0	29.7	30.4	30.6
	Women	33.0	32.9	33.3	34.0	35.0	35.3
Food and beverage service activities	Total	126.0	120.0	120.1	120.0	120.8	119.3
	Men	63.5	61.3	59.0	58.8	59.9	59.3
	Women	62.6	58.7	61.1	61.2	60.9	60.0
Land transport and transport via pipelines	Total	107.1	106.4	105.4	105.8	104.9	104.1
	Men	92.7	92.5	91.5	91.3	90.6	90.0
	Women	14.4	13.8	13.9	14.5	14.3	14.1
Water transport and air transport	Total	15.6	14.2	14.4	13.9	14.0	14.0
	Men	9.7	8.6	8.7	8.5	8.6	8.5
	Women	5.9	5.6	5.7	5.4	5.4	5.5

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

	2018 4 th quarter	2018 3 rd quarter	2018 2 nd quarter	2018 1 st quarter	2017 4 th quarter
Full-time jobs (90% and more)	138.9	142.2	140.6	138.4	137.6
Men	80.8	82.0	80.3	79.4	79.2
Women	58.1	60.2	60.3	59.0	58.4
Part-time jobs I (50–89%)	53.0	54.2	52.8	51.4	49.4
Part-time jobs II (15–49%)	41.0	42.0	42.6	42.9	44.6
Part-time jobs III (< 15%)	26.1	25.4	26.4	26.3	25.3
Total number of jobs (overall)	258.9	263.8	262.4	259.1	256.9
Men	114.0	115.0	114.1	114.3	113.8
Women	145.0	148.8	148.3	144.8	143.1

Source: Swiss Federal Statistical Office, Employment statistic

TRAVEL BEHAVIOUR OF THE SWISS RESIDENT POPULATION

In 2017, 90% of the Swiss resident population¹ undertook at least one trip with one or more overnight stays away from home. A total of 24.9 million trips were made, of which 8.2 million were within Switzerland. On average 3.3 trips were made per person, of which 1.1 had a domestic destination.

With 2.2 trips per person, persons aged 65 and more travelled less often than other age categories. People living in the German-speaking part of Switzerland undertook 3.3 trips, those from the French-speaking part 3.2 and the Italian-speaking population 2.6.

NUMBER OF TRIPS (IN 1000)

	2017	2016	2015	2014	2013
Trips with overnight stays	24 881	22 407	22 755	21 159	22 217
Day trips	76 022	76 920	79 660	75 780	76 447

In addition to trips with overnight stays, data on day trips are also collected. The Swiss resident population undertook a total of 76.0 million day trips in 2017, corresponding to an average of 10.0 trips per person. People living in the German-speaking part of Switzerland undertook 11.2 day trips, whereas one from the Italian- or French-speaking population made 7.1 and 6.9 trips per year respectively.

NUMBER OF TRIPS (PER PERSON)

	2017	2016	2015	2014	2013
Trips with overnight stays	3.3	3.0	3.1	2.9	3.0
Day trips	10.0	10.2	10.7	10.3	10.5

¹ Swiss resident population aged 6 or over: 7 617 983 persons

Source: Swiss Federal Statistical Office, Travel behaviour 2017

TRAVEL DESTINATION

Among the trips with overnight stays recorded in 2017, 33% had a Swiss destination. 40% of trips led to countries that border Switzerland, namely France (13%), Italy (12%) and Germany (11%). Finally, 20% of trips had a destination in other European countries and 7% outside Europe.

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

	2017	2016	2015	2014	2013
Switzerland	8 231	7 465	7 830	7 732	8 648
Germany	2 766	2 980	2 939	2 639	2 952
Austria	1 062	960	1 091	1 019	981
Italy	2 868	2 730	2 808	2 557	1 951
France ¹	3 213	1 913	2 244	2 003	2 247
Southeast Europe ²	950	948	981	972	933
Southwest Europe ³	1 949	1 797	1 434	1 497	1 310
Rest of Europe	2 082	1 925	1 939	1 283	1 616
Rest of the world	1 760	1 689	1 486	1 454	1 575
Unknown	–	–	3	3	4
Total	24 881	22 407	22 755	21 159	22 217

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 2017, trips of four or more overnight stays represented 65% of the outbound and only 38% of the inbound trips. On the other hand, trips with only one overnight stay accounted for 29% of domestic trips and 7% of trips abroad. In 2017, the main reasons for trips were, as in the previous year, holidays and recreation. They accounted for 57% of trips, and 68% of these had a foreign destination. In second place came trips for the purpose of visiting family and friends (27%). Business trips accounted for 6% of trips.

Source: Swiss Federal Statistical Office, Travel behaviour 2017

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

Commercially run holiday homes:

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.

Collective 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 2018, the Swiss hotel industry recorded a total of 38.8 million overnight stays, i.e. the best result to date. This represents a growth of 3.8% compared with the previous year. Swiss demand amounted to a record value of 17.4 million overnight stays, which corresponds to an increase of 2.9% compared with 2017. Foreign guests generated 21.4 million overnight stays, i.e. an increase of 4.5% and its best performance in 10 years. Germany accounted for the strongest foreign demand with 3.9 million overnight stays (+3.9% compared with 2017), followed by the United States with 2.3 million overnight stays (+10.1%) and the United Kingdom with 1.7 million (+2.3%). In terms of tourist regions, the Zurich Region recorded the highest number of overnight stays in 2018 with 6.3 million units (+5.4%). It was followed by the Bern Region with 5.3 million overnight stays (+5.0%) and Graubünden with 5.1 million overnight stays (+5.7%). In 2018, visitors stayed an average of 2.0 nights in Switzerland. For guests from within Switzerland the average length of stay was 1.9 nights while for those from abroad it was 2.1 nights. Among the tourist regions, Graubünden recorded the longest average stay with 2.7 nights.

DEVELOPMENT OF OVERNIGHT STAYS 2018

MONTHLY OVERNIGHT STAYS AND CHANGE IN % COMPARED TO THE SAME PERIOD OF 2017

	Overnight stays Total	Change in %	Overnight stays Foreigners	Change in %	Overnight stays Swiss	Change in %
January	2 871 590	6.0	1 451 485	5.6	1 420 105	6.3
February	3 194 275	4.8	1 557 541	6.5	1 636 734	3.1
March	3 328 071	5.5	1 774 949	7.5	1 553 122	3.3
April	2 576 811	1.2	1 438 387	2.2	1 138 424	-0.1
May	2 874 763	3.0	1 706 983	3.3	1 167 780	2.5
June	3 613 500	5.3	2 141 051	6.3	1 472 449	4.0
July	4 422 988	3.1	2 563 213	4.7	1 859 775	1.1
August	4 478 634	5.0	2 654 679	5.7	1 823 955	4.1
September	3 694 903	3.5	2 001 672	2.4	1 693 231	4.9
October	2 998 715	0.6	1 525 592	1.2	1 473 123	0.0
November	2 025 429	2.6	1 081 781	2.3	943 648	3.1
December	2 727 098	3.6	1 496 403	4.7	1 230 695	2.4
Entire year	38 806 777	3.8	21 393 736	4.5	17 413 041	2.9

Source: Swiss Federal Statistical Office, Statistics on tourist accommodation

Note: Due to rounding up or down, totals on the pages 17-22 may differ from the absolute figures indicated in the tables and may not add up to 100%.

OVERNIGHT STAYS BY COUNTRY OF RESIDENCE OF VISITORS

Country of residence of visitors	Calendar year 2018	Winter season 2017/2018 (November to April)	Summer season 2018 (May to October)
Total	38 806 777	16 575 711	22 083 503
Switzerland	17 413 041	7 866 181	9 490 313
Foreign countries	21 393 736	8 709 530	12 593 190
Europe total (excl. Switzerland)	12 264 511	5 797 491	6 429 647
Germany	3 891 896	1 780 699	2 087 612
United Kingdom ¹	1 652 318	792 426	862 146
France	1 285 857	627 680	648 208
Italy	919 812	458 043	463 437
Netherlands	632 963	274 830	354 191
Belgium	610 254	299 167	307 789
Nordic countries ²	509 772	201 484	206 923
Spain	486 733	199 359	286 540
Austria	380 067	154 183	227 665
Russia	356 917	206 876	151 743
Other countries Europe	1 537 922	802 744	833 393
America total	3 044 301	1 011 085	2 007 895
United States	2 252 701	690 645	1 539 128
Canada	270 959	89 466	179 587
Brazil	242 052	122 296	121 822
Other countries America	278 589	108 678	167 358
Asia total	5 416 780	1 640 937	3 754 441
China (incl. Hong Kong)	1 515 541	492 264	1 021 402
Gulf States ³	946 259	227 200	712 288
India	809 940	165 585	637 767
Republic of Korea	456 250	153 369	306 992
Japan	382 585	95 711	289 559
Other countries Asia	1 306 205	506 808	786 433
Africa total	279 595	128 145	148 801
Australia, New Zealand, Oceania total	388 549	131 872	252 406

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

Source: Swiss Federal Statistical Office, Statistics on tourist accommodation

HOTEL INDUSTRY: SUPPLY AND DEMAND 2018**CANTONS**

Canton	Capacity ¹		Overnight stays in thousands			Net occupancy rate in %	
	Rooms	Beds	Swiss	Foreigners	Total	Rooms ²	Beds ³
Graubünden	18 683	39 264	3 122	2 010	5 132	50	41
Bern	16 901	33 309	2 377	3 173	5 550	57	49
Zurich	15 755	27 709	1 655	4 044	5 699	68	57
Valais	13 503	28 057	2 207	1 922	4 129	52	44
Vaud	9 896	18 754	1 302	1 611	2 913	54	44
Geneva	9 653	15 828	626	2 607	3 233	67	56
Ticino	7 790	15 582	1 395	876	2 271	49	41
Lucerne	6 642	12 491	712	1 463	2 175	56	49
St. Gallen	4 607	8 866	594	389	984	41	32
Basel-Stadt	4 454	9 026	458	928	1 386	63	43
Aargau	3 368	5 703	384	342	726	45	36
Obwalden	2 003	4 183	271	403	673	56	47
Schwyz	1 962	3 824	381	184	565	45	42
Thurgau	1 935	3 452	274	152	426	45	35
Fribourg	1 923	3 974	278	166	444	42	32
Solothurn	1 768	3 236	220	211	431	50	37
Basel-Land	1 260	2 306	138	147	285	45	35
Zug	1 216	1 980	114	189	302	53	43
Uri	1 165	2 419	110	145	255	41	33
Nidwalden	1 137	2 438	157	172	329	48	38
Neuchâtel	1 072	1 933	125	102	227	42	33
Appenzell-Ausserrhoden	780	1 442	92	30	122	31	25
Jura	746	1 525	84	18	102	27	19
Glarus	693	1 509	119	16	135	32	27
Schaffhausen	605	1 177	82	72	155	48	37
Appenzell-Innerrhoden	532	1 693	136	23	160	49	27
Total	130 049	251 679	17 413	21 394	38 807	55	45

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 2018

Tourist region	Capacity ¹		Overnight stays in thousands			Net occupancy rate in %	
	Rooms	Beds	Swiss	Foreigners	Total	Rooms ²	Beds ³
Graubünden	18 683	39 264	3 122	2 010	5 132	49.7	40.5
Zurich Region	18 180	31 789	1 897	4 390	6 287	65.7	54.6
Bern Region	15 867	31 493	2 245	3 087	5 332	57.5	49.7
Valais	13 503	28 057	2 207	1 922	4 129	52.2	44.3
Lucerne / Lake Lucerne	12 347	24 364	1 556	2 307	3 862	52.7	45.3
Lake Geneva Region (Vaud)	9 896	18 754	1 302	1 611	2 913	53.9	43.7
Geneva	9 653	15 828	626	2 607	3 233	67.2	56.1
Eastern Switzerland	8 948	17 744	1 279	660	1 939	41.4	31.5
Ticino	7 790	15 582	1 395	876	2 271	49.1	41.4
Basel Region	5 871	11 579	610	1 086	1 696	58.3	40.6
Jura & Three-Lakes	3 723	6 926	463	301	763	41.8	31.1
Aargau Region	3 665	6 325	434	372	805	45.1	35.7
Fribourg Region	1 923	3 974	278	166	444	42.4	31.6
Total	130 049	251 679	17 413	21 394	38 807	54.5	44.6

COMMUNES 2018

Communes	Capacity ¹		Overnight stays in thousands			Net occupancy rate in %	
	Rooms	Beds	Swiss	Foreigners	Total	Rooms ²	Beds ³
Zurich	8 775	15 764	769	2 679	3 448	72.3	60.0
Geneva	6 407	10 461	303	1 856	2 158	67.7	56.6
Basel	4 326	8 550	451	924	1 375	64.2	44.4
Davos	3 348	6 607	491	416	907	52.2	43.6
Zermatt	3 187	6 385	588	838	1 425	72.5	66.3
Lucerne	3 083	5 945	310	1 089	1 399	73.1	64.8
Lausanne	2 934	5 195	425	532	957	61.7	50.5
St. Moritz	2 315	4 518	245	468	713	58.8	48.6
Bern	2 156	3 833	355	478	833	70.2	59.8
Opfikon	1 928	3 105	194	579	774	77.2	68.3
Lugano	1 615	3 031	208	292	500	55.2	46.3
Interlaken	1 588	3 192	141	651	792	74.3	68.7
Lauterbrunnen	1 547	2 989	123	420	543	60.7	57.4
Grindelwald	1 383	3 021	181	429	609	67.4	61.5
Other communes	85 457	169 083	12 629	9 743	22 372	47.7	38.6
Total	130 049	251 679	17 413	21 394	38 807	54.5	44.6

SUPPLY IN HOTELS AND HEALTH ESTABLISHMENTS

Year	Surveyed establishments	Surveyed rooms	Surveyed beds	Open establishments	Available rooms	Available beds
2018	4 765	140 884	274 792	4 275	130 049	251 679
2017	4 878	141 404	275 203	4 369	130 053	250 990
2016	4 949	140 331	271 710	4 411	128 523	246 432
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

DEMAND IN HOTELS AND HEALTH ESTABLISHMENTS

Year	Arrivals	Overnight stays	Average duration of stay	Net occupancy rate in % (rooms) ²	Net occupancy rate in % (beds) ³
2018	19 353 083	38 806 777	2.0	54.5	44.6
2017	18 562 061	37 392 740	2.0	52.9	43.0
2016	17 477 932	35 532 576	2.0	51.3	41.6
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

SIZE OF HOTELS AND HEALTH ESTABLISHMENTS

Size of establishment	Open establishments	in %	Arrivals	Overnight stays
0 to 10 beds	486	11.4	100 253	217 161
11 to 20 beds	833	19.5	513 488	1 010 209
21 to 50 beds	1 428	33.4	2 947 981	5 942 622
51 to 100 beds	896	21.0	4 967 219	10 024 698
101 to 150 beds	308	7.2	3 226 333	6 602 381
151 to 200 beds	131	3.1	1 821 810	3 754 868
201 to 300 beds	112	2.6	2 640 822	5 105 053
301 and more beds	82	1.9	3 135 177	6 149 785
Total	4 275	100.0	19 353 083	38 806 777

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

SUPPLEMENTARY ACCOMMODATION ¹

Following the suspension of the supplementary accommodation statistics in 2003, the survey of commercially-run holiday homes and collective accommodation (PASTA) was reintroduced in 2016. The survey is carried out nationally, based on a sample of representative units. For its implementation, the new statistics have called for a new methodology to fulfil both current standards and to optimise the quality of the results and reduce the burden on respondents. Subsequently, it is not possible to compare directly the results of the new and old statistics.

The survey of campsites was reintroduced in 2005. Comprehensive observations are made by the tourist accommodation statistics (HESTA).

HOLIDAY HOMES

Over the past year, holiday homes registered 7.5 million overnight stays. This represents a rise of 2.9% compared with 2017. Domestic demand totalled 4.4 million overnight stays (-1.1% compared with the previous year) whereas foreign demand reached a total of 3.2 million (+8.9%) units. More than 80% of overnight stays by foreign visitors were by visitors from Europe (2.6 million / +8.0%). In 2018, the Lake Geneva region was the major region that registered the highest number of overnight stays with 3.2 million, followed by Eastern Switzerland and Espace Mittelland (with 2.2 million and 1.2 million overnight stays respectively). In 2018, the average length of stay in holiday accommodation was 6.6 nights.

SUPPLY AND DEMAND 2018











Major region	Holiday homes surveyed	Beds surveyed	Arrivals	Overnight stays	Duration of stay
Lake Geneva Region	14 637	76 043	482 790	3 229 485	6.7
Eastern Switzerland	8 744	40 899	309 789	2 178 894	7.0
Espace Mittelland	3 987	19 224	196 513	1 169 210	5.9
Ticino	2 122	9 200	61 117	406 866	6.7
Central Switzerland	1 600	7 657	84 134	484 638	5.8
Zurich	204	634	7 823	35 718	4.6
Northwest Switzerland	153	492	4 279	25 519	6.0
Total	31 447	154 149	1 146 446	7 530 328	6.6

¹ Non-hotel accommodation

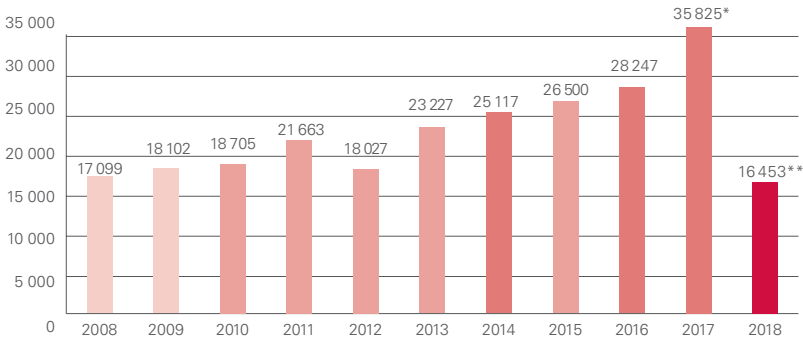
Source: Federal Statistical Office, Supplementary accommodation statistics

CLASSIFIED HOLIDAY RESIDENCES

HOLIDAY APARTMENTS, GUEST ROOMS AND BED & BREAKFASTS BY REGIONS 2018

Tourist region											Total
Valais	122	227	192	1 200	545	3 067	603	183	38	3	6 180
Graubünden	66	115	176	843	627	2 311	466	158	36	2	4 800
Bern Region	12	63	64	317	192	1 057	323	94	63	1	2 186
Lucerne / Lake Lucerne	0	10	81	111	44	401	77	44	18	0	786
Ticino	1	10	18	100	39	390	52	57	12	5	684
Eastern Switzerland/Liechtenstein	1	2	7	113	23	307	64	31	7	1	556
Lake Geneva Region (Vaud)	2	27	14	71	55	190	44	38	2	0	443
Jura & Three-Lakes	0	2	9	45	33	202	81	36	13	3	424
Fribourg Region	0	3	2	11	3	65	15	12	0	0	111
Zurich Region	0	2	0	20	4	65	0	12	0	1	104
Basel Region	0	0	0	14	3	53	8	13	1	0	92
Aargau Region	0	0	0	18	1	39	0	12	0	1	71
Geneva	0	1	0	5	0	8	0	2	0	0	16
Total	204	462	563	2 868	1 569	8 155	1 733	692	190	17	16 453**

AWARDED CERTIFICATES 2008 – 2018



As of 31.12.2018

* incl. holiday homes which were already classified in 2017 according to the new procedure (valid from 2018)

** valid classifications at the end of 2018 according to the new procedure

Source: Swiss Tourism Federation

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

COLLECTIVE ACCOMMODATION

Collective accommodation recorded 5.4 million overnight stays in 2018, i.e. growth of 0.8% compared with the previous year; 4.4 million units were by Swiss clientele (+2.3%). Foreign visitors generated 1.1 million overnight stays, a decrease of 5.1%. Visitors from the European continent represented the greatest number of foreign overnight stays with a total of 777 000 units (-6.2%). At major region level, the Espace Mittelland recorded the greatest number of overnight stays with 1.5 million. This was followed by Lake Geneva region (1.4 million) and Eastern Switzerland (1.3 million). In 2018, the average length of stay in collective accommodation was 2.5 nights.

SUPPLY AND DEMAND 2018

Major region	Establishments surveyed	Beds surveyed	Arrivals	Overnight stays	Average duration of stay
Espace Mittelland	657	30 811	603 325	1 452 251	2.4
Eastern Switzerland	619	28 846	513 376	1 347 050	2.6
Lake Geneva region	604	29 982	576 875	1 394 433	2.4
Central Switzerland	275	13 125	267 353	593 932	2.2
Ticino	177	8 224	146 119	411 455	2.8
Zurich	72	2 832	60 732	150 156	2.5
Northwest Switzerland	40	1 860	39 175	91 081	2.3
Total	2 444	115 680	2 206 955	5 440 358	2.5

Source: Federal Statistical Office, Supplementary accommodation statistics

YOUTH HOSTELS

With a network of 50 hostels (previous year: 51) and a bed capacity of 6 006 (previous year: 6 123), the youth hostels in Switzerland recorded a total of 781 000 overnight stays in 2018, 0.6% less than in the year before. Demand from domestic guests declined by 0.4% to 545 000 overnight stays. Foreign guests spent 1.1% fewer overnight stays at youth hostels than in the previous year, i.e. 236 000. German guests accounted for the highest foreign demand with 68 000 overnight stays (+2.9%). They were followed by guests from South Korea with 26 000 overnight stays (-6.3%), and by guests from Great Britain with 16 000 overnight stays (+6.8%). The best-visited tourist region in 2018 was once again Graubünden with 151 000 registered overnight stays (+8.2%). The second-largest number of overnight stays was recorded by the Berne region with 136 000 units (+26.1%), and the third-largest by Zurich with 103 000 units (-4.3%). The average length of stay of youth hostel guests in Switzerland in 2018 was 2.0 nights (unchanged from the previous year). Domestic guests spent an average of 2.0 nights, while foreign guests averaged 1.9 nights. Among the tourist regions, Graubünden recorded the longest average length of stay with 2.6 nights.

SUPPLY AND DEMAND 2018

Tourist region	Surveyed establishments	Surveyed beds	Arrivals	Overnight stays	Average duration of stay
Graubünden	9	1 192	58 745	150 962	2.6
Zurich Region	8	794	57 517	102 596	1.8
Lucerne/Lake Lucerne	5	478	31 460	55 127	1.8
Eastern Switzerland	5	458	27 499	46 099	1.7
Ticino	3	472	x	x	x
Valais	5	664	37 518	82 431	2.2
Lake Geneva (Vaud)	3	476	x	x	x
Basel Region	2	312	x	x	x
Bern Region	7	917	75 663	136 369	1.8
Fribourg Region	1	84	x	x	x
Jura & Three-Lakes	2	159	x	x	x
Total	50	6 006	389 960	780 947	2.0

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

Source: Swiss Youth Hostels

CAMPSITES

In 2018, the campsites¹ recorded 3.6 million overnight stays representing an increase of 12.8% compared with the previous year. Swiss guests accounted for 2.4 million overnight stays, up 12.0%. Foreign guests generated 1.2 million overnight stays, up 14.4%. German guests accounted for 459 000 overnight stays (+14.4% compared with 2017), which corresponds to the highest absolute result among the foreign countries. They were followed by visitors from the Netherlands with 250 000 overnight stays (+14.7%), France with 105 000 (+14.7%) and the United Kingdom with 100 000 (+16.8%). With a total of 699 000 overnight stays for 2018, Ticino ranks first among all tourist regions in terms of absolute overnight stays and saw a 6.7% decrease compared with the previous year. The Lake Geneva Region (Vaud) / Geneva² followed it with 490 000 overnight stays (+7.0%). For Switzerland as a whole, the average length of stay was 2.9 nights in 2018. Swiss guests spent an average of 3.1 nights on campsites while foreign guests stayed 2.6 nights. Of all tourist regions, Ticino recorded the longest average length of stay with 3.9 nights.

SUPPLY AND DEMAND 2018

Tourist region	Surveyed establishments	Overnight leased campsites	Arrivals	Overnight stays	Average duration of stay
Valais	59	5 312	126 960	416 228	3.3
Bern Region	59	3 704	164 666	460 662	2.8
Lake Geneva Region (Vaud)/Geneva ²	44	3 523	144 010	490 426	3.4
Graubünden	42	3 669	117 834	353 971	3.0
Lucerne/Lake Lucerne	39	2 196	143 085	352 979	2.5
Jura & Three-Lakes	37	2 434	88 471	247 610	2.8
Eastern Switzerland	37	1 750	93 266	221 256	2.4
Ticino	33	4 944	180 447	698 695	3.9
Zurich Region	23	1 286	132 998	224 961	1.7
Fribourg Region	13	721	25 987	61 959	2.4
Aargau Region	10	341	15 112	41 123	2.7
Basel Region	5	129	5 009	9 847	2.0
Total	401	30 010	1 237 844	3 579 715	2.9

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

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

The Agrotourism Switzerland organization has over 350 members. A third of these members come from collective partners in Emmental-Oberaargau, Toggenburg and Wallis. They offer a variety of accommodations, restaurants, farm shops and events. Based on positive customer ratings and feedback, they have all been awarded the Agritourism quality seal of approval.

The major investment in creating a new homepage using the latest technology along with the change to the URL www.myfarm.ch has been a positive move. In 2018 we had 250 000 visitors to our homepage. This was a 100% increase over the previous year. And, inquiries on search engines have tripled. Vacationers, mostly from Switzerland and Germany, have access to over 450 overnight stays in apartments, rooms, alpine huts or sleeping on straw. There are also group accommodations available which include camping and tepees. Most of these possibilities can be booked on-line but direct bookings at farms are increasing. In 2018 we totaled more than 230 000 overnight stays (+10%) and reached sales of CHF 7 million.

People are becoming more climate conscious and prefer to spend holidays in their own country or travel to their destination via public transportation. At the same time, awareness of new and innovative care of animals and environmentally friendly agriculture is on the rise. A holiday on the farm caters to this awareness. A farm experience offers a generous supply of peace and quiet, healthy food, contact with the farm animals and direct contact with the host family. Farms offering direct participation by guests are becoming ever more popular. Chores could include feeding or milking the animals, sowing and harvesting or possibly preparing local products and dishes.

Holidays «just for kids» are still very much in demand - farm holidays are cool!

OVERNIGHT STAYS AND TURNOVER 2018

	Holiday apartments/ alpine huts	Guest rooms	Group accommodations	Campground/ Camping/Tepee	Total
Offers	159	134	135	24	452
Ø Overnight stays per operation	630	324	473	906	
Total overnight stays	98 950	43 437	64 491	23 793	230 671
Ø Price per person	30	50	25	12	
Turnover	2 968 500	2 171 850	1 612 275	285 516	7 038 141

Source: Agritourism Switzerland

BED AND BREAKFAST

In 2018, the average length of stay decreased slightly to 2.2 nights (2017: 2.3 nights). The number of registered accommodations was 681 (2017: 843). This does not match the actual number of hosts. Listed are only those accommodations that were active in both years (2017 and 2018). Therefore, the results are not directly comparable. In 2018, a total of 154 110 guests stayed in 681 accommodations in Switzerland (2017: 162 465 in 843 lodgings). They generated a total of 335 476 overnight stays (2017: 372 204 overnight stays). In contrast to 2017, the proportion of Swiss guests increased slightly: 176 411 overnight stays = 52.6% (2017: 192 412 = 51.7%). There were fewer guests from Europe: 127 247 overnight stays = 37.9% (2017: 145 391 overnight stays = 39.1%).

SUPPLY AND DEMAND

Year	Establishments ¹	Rooms	Beds	Arrivals	Overnight stays Swiss	Overnight stays foreigners	Overnight stays total
2018	681	2 228	4 519	154 101	176 411	159 065	335 476
2017	843	2 667	5 366	162 465	192 412	179 792	372 204
2016	912	2 887	5 777	171 854	210 000	186 017	396 017
2015	911	2 830	5 658	168 062	204 000	192 423	396 423

Tourist region	Overnight stays 2018	Overnight stays 2017	Change in %
Bern Region	46 543	54 553	-14,68
Valais	41 594	45 514	-8,61
Lucerne / Lake Lucerne	38 309	49 074	-21,94
Ticino	31 821	32 512	-2,13
Zurich Region	27 944	29 480	-5,21
Eastern Switzerland	26 493	24 451	8,35
Lake Geneva Region (Vaud)	26 065	29 752	-12,39
Aargau Region	24 989	32 926	-24,11
Graubünden	22 989	23 664	-2,85
Jura & Three-Lakes	21 141	20 917	1,07
Fribourg Region	12 093	12 408	-2,54
Basel Region	11 088	13 173	-15,83
Geneva	4 407	3 780	16,59
TOTAL	335 476	372 204	-9,87

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

HOTEL AND RESTAURANT INDUSTRY

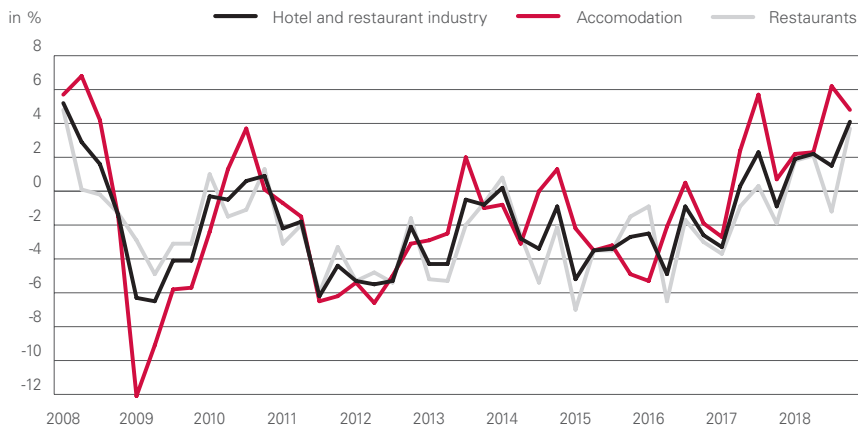
MAJOR EMPLOYER IN SWITZERLAND

261 076	employees (2018)
7 845	trainees in basic vocational education and training (2017)
28 985	hotel and restaurant establishments (2016)
26 390	VAT-taxable hotel and restaurant establishments (2016)
28.4	billion francs of VAT-taxable annual turnover in catering business and hotels (2016)
913.6	million francs paid in VAT (after pre-tax deduction) (2016)
	or
7.5	% of the overall net Federal Tax Administration (FTA) receivables (2016)

With 261 076 employees, the Swiss hospitality industry is one of Switzerland's largest employers. Around 5.2% of all employees work in the hospitality industry. In addition, the hospitality industry trains around 7 845 youths in the context of vocational education and training ("apprenticeships"). Alongside jobs in the hospitality industry itself, this sector also indirectly creates many jobs in other fields, for instance in construction, agriculture and specialised trade. Around half of the meat consumed in Switzerland is processed by the gastronomy segment, for example. This creates jobs in agriculture and in butcheries.

The Federal Statistical Office's most recent count of establishments (2016) showed that there were 28 985 hospitality establishments in Switzerland. A survey of GastroSuisse members showed that 69.8% of these were restaurants without overnight accommodation, 27.9% were hotels with restaurants and 2.3% were hotels without restaurants. The combined annual revenue of all hospitality establishments subject to VAT was around 28.4 billion francs. The hospitality industry makes a significant contribution to VAT income. In 2016, for instance, the hospitality industry paid 913.6 million francs in net VAT. The 26 390 hospitality establishments contributed a full 7.5% of the Federal Tax Administration's (FTA's) total net tax receivables in 2016.

Source: GastroSuisse, Industry Report 2019

SALES PERFORMANCE COMPARED TO PREVIOUS YEARS

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

**HOSPITALITY INDUSTRY (HOTEL INDUSTRY AND RESTAURANT INDUSTRY):
CHANGE IN SALES IN 2018 COMPARED TO PREVIOUS YEARS**

1 st quarter	+1.9%	3 rd quarter	+1.5%
2 nd quarter	+2.2%	4 th quarter	+4.1%

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

In the 1st quarter, revenue rose by 1.9% compared to the prior-year quarter. This trend continued in the second quarter (+2.2%). In the third quarter, the hospitality industry saw a 1.5% growth in revenue, whereby the revenue increase was limited to the hotel industry (+6.2%). Revenue in the restaurant industry decreased (-1.2%). In the fourth quarter, the two industries harmonised again. This resulted in a 4.1% overall rise in revenue.

**ACCOMMODATION:
CHANGE IN SALES IN 2018 COMPARED TO PREVIOUS YEARS**

1 st quarter	+2.2%	3 rd quarter	+6.2%
2 nd quarter	+2.3%	4 th quarter	+4.8%

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

In the first quarter, revenue in the hotel industry grew by 2.2% compared to the prior-year quarter. This was followed by a minor breakthrough in the summer: the hotel industry increased its revenue in the third quarter by 6.2%. This is reflected by the average room occupancy rate, which was exceptionally high at 66.6%. Finally, the accommodation industry saw 4.8% revenue growth in the fourth quarter.

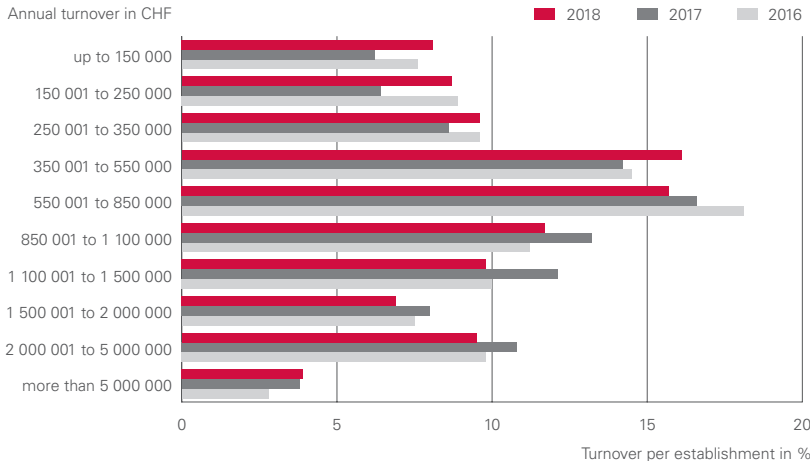
**RESTAURANT INDUSTRY:
CHANGE IN SALES 2018 COMPARED TO PREVIOUS YEARS**

1 st quarter	+1.8%	3 rd quarter	-1.2%
2 nd quarter	+2.1%	4 th quarter	+3.7%

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

In the first (+1.8%) and second (+2.1%) quarter, the restaurant industry recorded a growth in revenue. Although the establishments also expected rising demand in the third quarter, revenue in the restaurant industry dropped by 1.2%. The hot temperatures only had a positive impact on income in individual regions and certain establishments. With a 3.7% rise in revenue compared to the previous year's quarter, the restaurant industry achieved very high revenue growth in the 4th quarter. The last time this industry recorded such a high increase was in 2007/08.

TURNOVER PER ESTABLISHMENT



Source: GastroSuisse, Industry Report 2019

While a shift from lower to higher revenue categories was still evident in 2017, the opposite trend was seen in 2018. The percentage of establishments with revenue of up to 550 000 francs increased once more and now amounts to 42.5%. In 2017, it was still at 35.4%.

Accordingly, there were fewer establishments with revenue over 550 000 than in the prior year. This ended the trend towards higher revenue per establishment, which had been observed since 2015. The revenue category “over 5 million francs” is an exception. This saw an increase from 3.8% in 2017 to 3.9%. The biggest difference to the year 2017 is evident in the revenue categories “150 001 to 250 000 francs” and “1 100 001 to 1 500 000 francs” (+2.3 percentage points and -2.3 percentage points, respectively).

AN OVERVIEW OF IMPORTANT KEY RATIOS FOR THE RESTAURANT INDUSTRY 2017

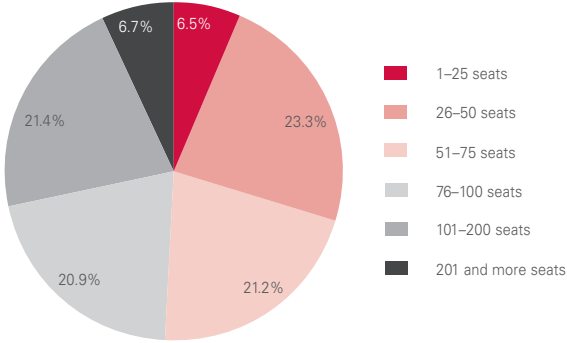
Total turnover per operating day	2 597 CHF
Total turnover per employee	127 193 CHF
Total turnover per employee and operating day	483 CHF
Turnover per restaurant per seat	8 806 CHF
Turnover per restaurant per seat and operating day	33 CHF
Turnover from food preparation per seat	6 534 CHF
Turnover from food preparation per seat and operating day	25 CHF

Source: Gastroconsult, Industry Report 2019

In the calendar year 2017, the average revenue in a restaurant was 2 597 francs per day of operation. To this figure, each employed person contributed 483 francs per day, leading to a revenue of 127 193 francs per person over an average 263 days of operation. The revenue per seat per day of operation was 33 francs, of which 25 francs were accounted for by kitchen services.

More information can be found in the industry report “Branchenspiegel 2019”, published by Gastro-Suisse. This can be obtained from GastroSuisse (tel. 0848 377 112) for 35 francs.

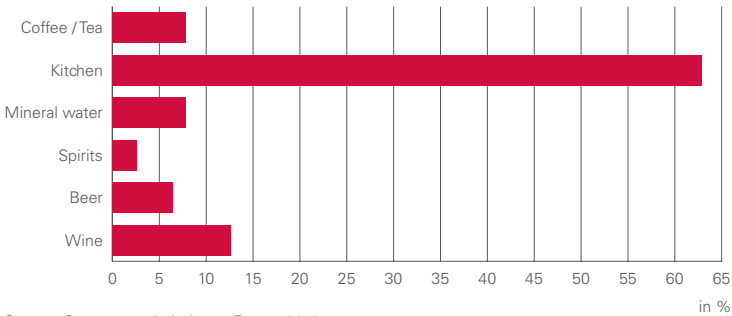
SIZE OF ESTABLISHMENT: NUMBER OF SEATS (2018)



Source: GastroSuisse, Industry Report 2019

REVENUE BREAKDOWN 2017

In 2017, the average revenue from kitchen services was 62.9%, 1.5 percentage points lower than in 2016 and somewhat higher than in 2015. The portion of revenue accounted for by alcoholic beverages remained in second place with 21.6% and increased to the detriment of the kitchen revenue’s portion. The sale of coffee, tea and mineral water made up 15.5% of the average restaurant’s revenue.



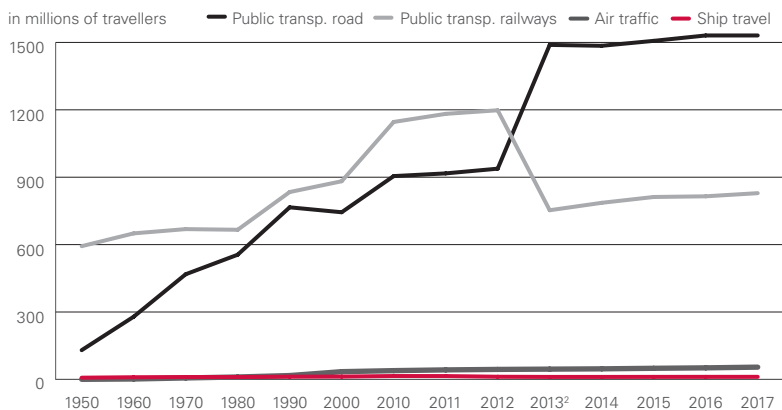
Source: Gastroconsult, Industry Report 2019

TOURISM INFRASTRUCTURE

TRANSPORT

PASSENGER TRANSPORTATION BY PUBLIC TRANSPORT¹

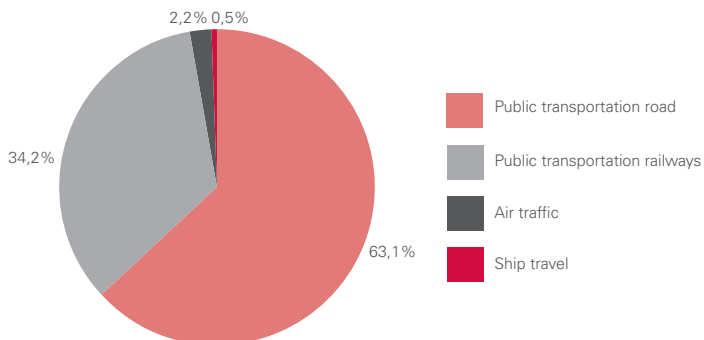
NUMBER OF PASSENGERS PER CARRIER 1950–2017



¹ Since 2017 private road traffic is no longer included in the passenger transportation statistics of LITRA.

² Since 2013 tramways are shown under «Public transportation road».

NUMBER OF PASSENGERS PER CARRIER 2017 IN % OF TOTAL PUBLIC TRANSPORT



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 28 555 kilometres. 25 497 stopping points are served. In 2018, 2.6 million passengers made use of a half-fare card, 490 200 persons held a general abonnement valid throughout the country and over 1.3 million persons obtained a combined season ticket in one of the 18 regional tariff networks.

ONE OF THE DENSEST RAILWAY NETWORKS IN THE WORLD

The railroad network of Switzerland totals 5 443 kilometres. 3 088 kilometres are part of the Swiss Federal Railways network. From Monday to Friday, the Swiss railways (SBB) operate around 8 900 passenger trains or 404 000 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 2018, Swiss Federal Railways carried 1.25 million passengers per day. The average journey distance mounted to 40 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 2016, 118 transport companies transported guests by tram, trolley bus and bus on a 21 529 kilometre-long network (figures include PostBus). Around 17 250 employees were necessary in order to transport over 1.5 billion passengers with buses and trams.

The 901 PostBus routes operate a network of over 12 700 kilometres. 2 568 PostBus employees, with an additional 1 730 drivers from PostBus operators, conveyed more than 155 million passengers with 2 412 Postbuses. The vehicles covered an overall distance of 120 million kilometers.

Sources: LITRA Public transport information service, PostBus Switzerland Ltd., Public Transport Association, Swiss railway network

NAVIGATION: ACTIVE LAKE AND RIVER CRUISING IN SWITZERLAND

In 2018 the 15 companies joined together in the Association of Swiss Navigation Companies (ASNC) transported a total of 13.25 million passengers with 148 boats. This represents an increase of 1 030 000 passengers compared to the prior year.

Lake Lucerne, with 3.04 million passengers, lead the ranking based on the number of passengers, followed by the Lake Geneva with 2.40 million passengers and the Lake Zurich Horgen–Meilen ferry with 2.05 million passengers and Lake Zurich (incl. Limmat River) with 1.78 million passengers.

In distance travelled, the performance rised by 6 000 kilometres to 2.52 million kilometres. Inland waterway transportation covers a network of approximately 1 545 kilometres.

Source: ASNC Association of the Swiss Navigation Companies

AIR TRAFFIC: ALMOST 58 MILLION AIR PASSENGERS

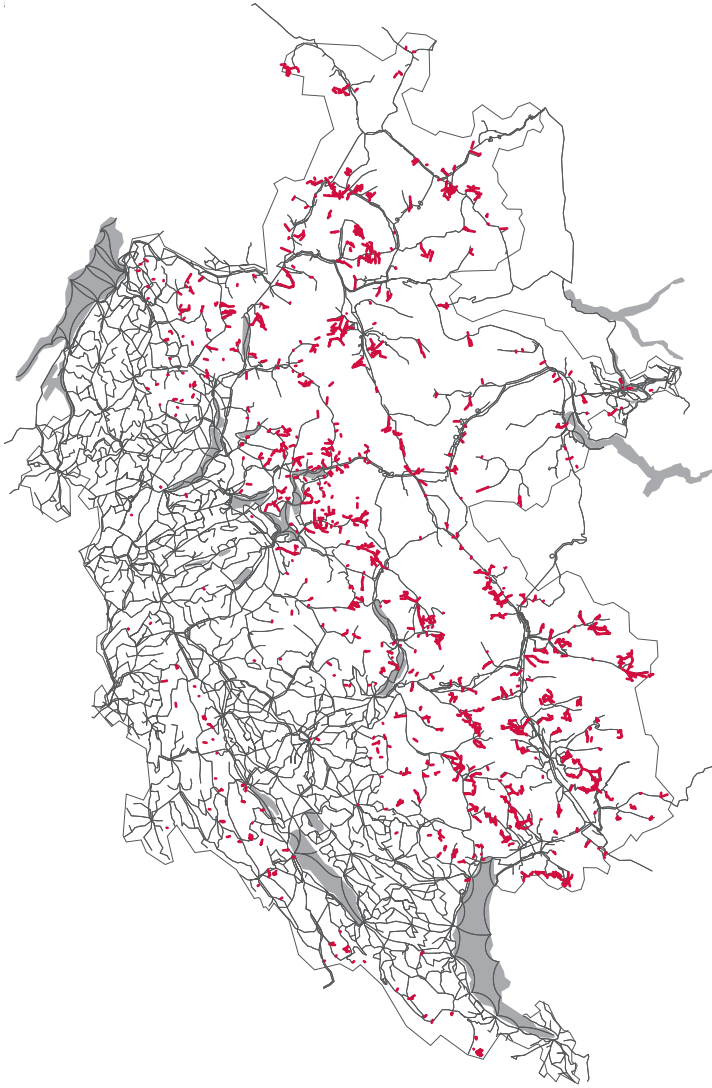
In 2018, Switzerland's airports registered 0.5 million take-offs and landings by scheduled and charter flights as well as 57.6 million passengers (local and transit passengers). While the number of flight movements of scheduled and charter flights has dropped by 12% since 2000, the number of passengers has increased by 67%.

FLIGHT MOVEMENTS AND PASSENGERS

Airport	Movements	Local and transfer passengers	Transit passengers	Total passengers
Zurich Kloten	244 430	31 069 873	33 044	31 102 917
Genève Cointrin	144 721	17 577 577	15 335	17 592 912
Basel Mulhouse	73 225	8 559 352	7 951	8 567 303
Bern Belp	4 003	137 042	63	137 105
Lugano Agno	2 753	88 570	0	88 570
St. Gallen Altenrhein	2 232	113 599	0	113 599
Sion	508	8 782	0	8 782
Total	471 872	57 554 795	56 393	57 611 188

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)

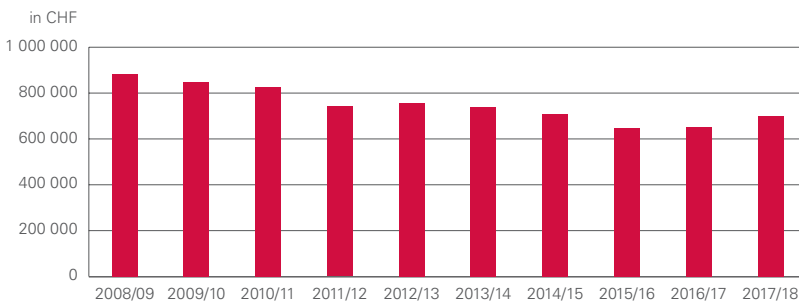
Sources: Public Transport Association, Swiss Cableways

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 2017, there were 2 486 licensed facilities in Switzerland. Almost 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 3 457 full-time employees and just under 7 000 seasonal workers (summer and winter) in transport operations alone.
- In its core business of passenger transport, Swiss cableways achieved in the 2017/18 winter season the sum of CHF 698 million. Additional revenue of CHF 379 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 55% of all passenger transports' income in Switzerland.

CHANGE IN WINTER REVENUE IN SWITZERLAND (ONLY PASSENGER TRANSPORTS' INCOME) (IN 1000)

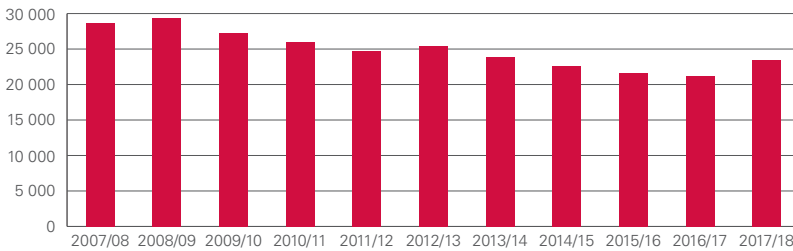


Source: Swiss Cableways (SCW), Facts and Figures on the Swiss Cableways Industry 2018; Laurent Vanat, season balance 2017/18

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.

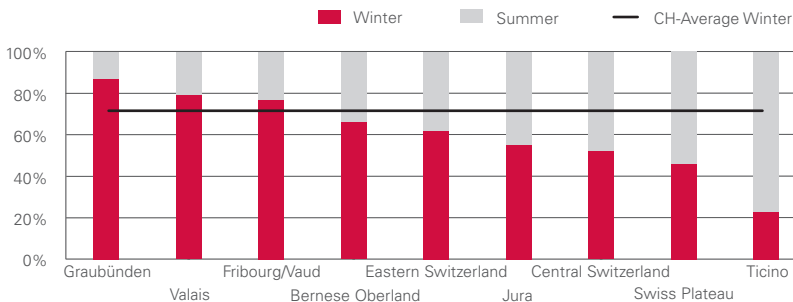
EVOLUTION OF SKIER-DAYS IN SWITZERLAND (IN 1000)



Source: Swiss Cableways (SCW), Facts and Figures on the Swiss Cableways Industry 2018; Laurent Vanat, season balance 2017/18

SEASONAL DISTRIBUTION OF PASSENGER TRANSPORT INCOME

The importance of the summer season for the cableway sector varies greatly from region to region. While the winter season with a share of 87% is the most important in the Graubünden, earnings during the summer account for approximately two thirds of total annual sales in the Ticino. In Switzerland as a whole, the winter quota is 72%. Valais and Graubünden generate by far the largest income from passenger transport. In absolute figures, the 13% summer quota in Graubünden (CHF 29.2 million) still represents significantly more income than the 77% summer quota in Ticino (CHF 7.5 million).



Source: Swiss Cableways (SCW), Facts and Figures on the Swiss Cableways Industry 2018

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. In 2017, the availability of winter hiking, snowshoe walking, cross-country skiing and sledging was expanded. 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

SUMMER

	National routes	Regional routes	Local routes	Number of kilometres
Hiking	7	63	294	12 800
Cycling	9	54	45	11 000
Mountain biking	3	16	224	9 500
Skating	3	13	2	1 200
Canoeing	1	8	3	350
Total	23	154	637	34 850

Status as of 31.12.2018

WINTER

	Number of offers
Winter hiking	139
Snowshoe walking	168
Cross-country skiing	154
Sledging	90
Total	551

Status as of 31.12.2018

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 around 13 million in 2018.

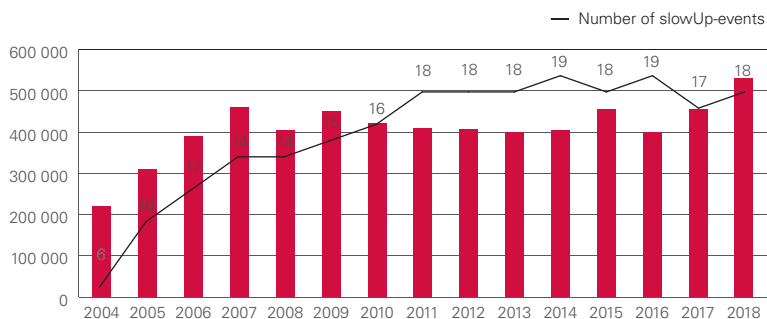
	Swiss users	Foreign visitors	Turnover from Swiss users (in CHF)	Turnover from foreign users (in CHF)	Total turnover (in CHF)
Hiking	920 000	101 000	270 million	30 million	300 million
Cycling	750 000	75 000	290 million	65 million	355 million
Mountain biking	160 000	16 000	65 million	10 million	75 million
Total	1 830 000	192 000	625 million	105 million	730 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 2004–2018



Participants:

- 50% each women and men
- Average age: 35.8 years
- Expenditures per person: CHF 27.70

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 more than 850 suggestions for hiking throughout Switzerland: www.schweizer-wanderwege.ch.

NETWORK OF HIKING TRAILS PER REGION 2018

Major region	Total network of walks (km)	Paved walks (km)	Mountain walks (km)
Eastern Switzerland	19 640	4 407	11 555
Espace Mittelland	15 339	4 691	2 692
Lake Geneva Region	12 875	2 836	3 633
Central Switzerland	8 173	2 280	3 202
Ticino	4 366	612	3 485
Zurich	2 970	995	19
Northwest Switzerland	2 759	944	7
Total	66 122	16 765	24 593

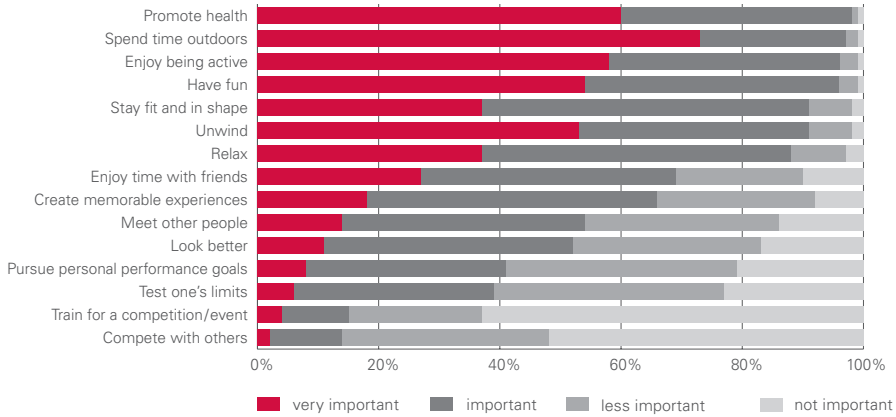
Source: Swiss Hiking

FACTS FROM THE STUDY «HIKING 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 11 years, the latest map (updated January 2019) includes 18 parks and park projects, representing more than 12% of the area of Switzerland in 12 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.

In addition to the Swiss National Park, Switzerland has 15 regional nature parks and one nature discovery park that meet the requirements of the Parks Ordinance (ParkO) to the NCHA. There is also the Jorat Nature Discovery Park, a park project in the Canton of Vaud. Only in one category, the national parks of the new generation, there is no further project after the failure of the Parc Adula and the national park project of the Locarnese.

Nonetheless, the Swiss park policy is a success story: regional nature parks have emerged in most 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 the 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. The parks were also honoured by the ‘Denk an mich’ foundation for their commitment to barrier-free tourism.

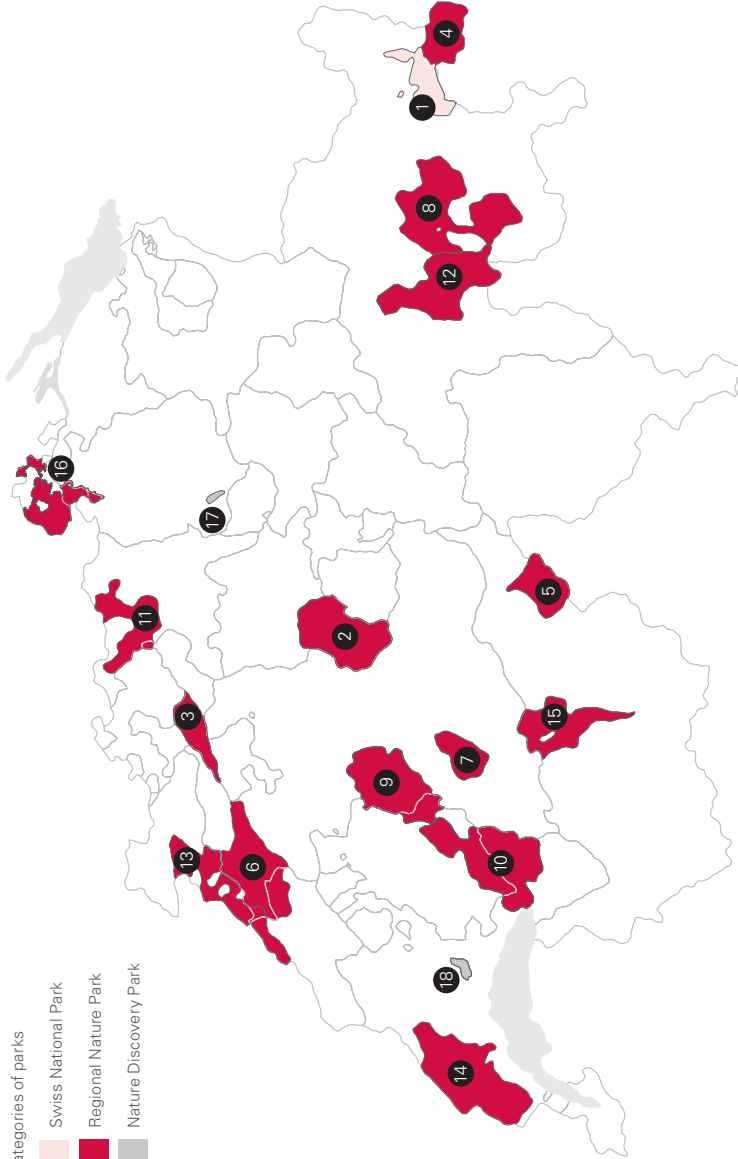
Various studies show that the parks bring considerable added value to their regions in terms of tourism: The evaluation of an extensive guest survey conducted by ETH Zurich in the nature parks Binntal, Ela, Gantrisch and Jura vaudois (Knaus 2018) shows that the tourist value added is up to six times higher than what the federal government, the cantons and the municipalities invest in the parks.

Source: Swiss Parks Network

SWISS PARKS

Categories of parks

- Swiss National Park
- Regional Nature Park
- Nature Discovery Park



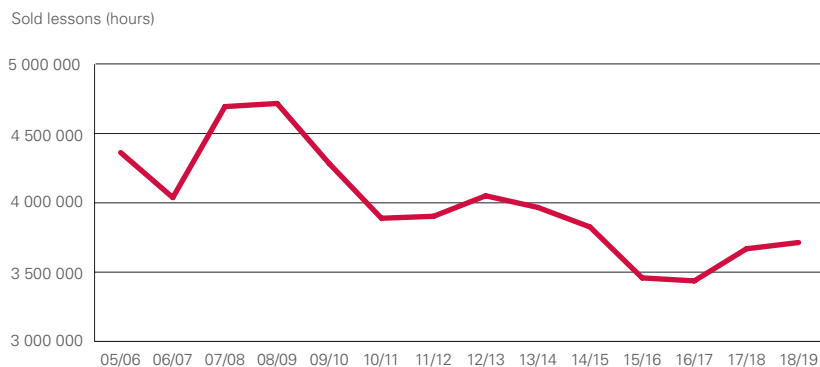
- 1 Swiss National Park | 2 UNESCO Biosphère Entlebuch | 3 Naturpark Thal | 4 Biosfère Val Müstair | 5 Landschaftspark Bimtal | 6 Parc régional Chasseral | 7 Naturpark Diemtigen | 8 Parc Ela | 9 Naturpark Gamtrisch | 10 Parc naturel régional Gruyère Pays-d'Enhaut | 11 Jurapark Aargau | 12 Naturpark Beverin | 13 Parc du Doubs | 14 Parc Jura vaudois | 15 Naturpark Pfyn-Finges | 16 Regionaler Naturpark Schaffhausen | 17 Wildnispark Zürich Sihlwald | 18 Parc naturel périurbain du Jorat**

** Candidate Nature Discovery Park

SWISS SKI SCHOOLS

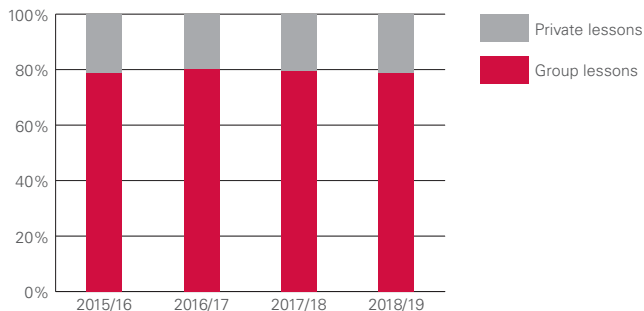
154 Swiss ski schools employ approximately 4 000 ski, snowboard, telemark and nordic instructors. During the high season, as many as 7 000 teach in these schools that offer skiing, snowboard, nordic and telemark lessons for both children and adults. On request, there are also a number of other sporting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

CHANGE IN THE NUMBER OF LESSONS SOLD BY SWISS SKI SCHOOLS¹



¹ Status as of May 2019

BREAKDOWN OF GROUP AND PRIVATE LESSONS



Source: SWISS SNOWSPORTS

Up-to-date figures for the season will be available at www.snowsports.ch as of August. These will additionally be published in the annual report.

FORMAL EDUCATION

VOCATIONAL EDUCATION AND TRAINING

FEDERAL VET DIPLOMA

Hotel and restaurant	Certificates of qualification issued		Apprentices hired	
	2018	2017	2018	2017
Hotelfachmann/-frau EFZ	296	318	299	303
Hotel-Kommunikationsfachmann/-frau EFZ	–	–	127	109
Koch/Köchin EFZ	1 382	1 444	1 589	1 580
Restaurationsfachmann/-frau EFZ	528	519	484	474
Systemgastronomiefachmann/-frau EFZ	50	54	58	49

Transport services

Matrose/Matrosin der Binnenschifffahrt EFZ	10	11	14	18
Seilbahn-Mechatroniker/in EFZ	25	16	27	39
Fachmann/-frau öffentlicher Verkehr EFZ	35	–	63	68

Economy and administration

Kaufmann/-frau EFZ B

Hotel-Gastro-Tourismus	17	31	9	7
Öffentlicher Verkehr	12	17	6	2
Reisebüro	7	6	8	2
Transport	13	14	5	7

Kaufmann/-frau EFZ E

Hotel-Gastro-Tourismus	203	192	133	146
Öffentlicher Verkehr	304	301	200	220
Reisebüro	120	145	123	126
Transport	24	20	27	26

FEDERAL VET CERTIFICATE

Hotel and restaurant

Hotellerieangestellte/r EBA	25	26	22	33
Küchenangestellte/r EBA	271	258	393	380
Restaurationsangestellte/r EBA	107	112	151	140
Seilbahner/in EBA	6	5	5	–

Source: Swiss Federal Statistical Office

HIGHER VOCATIONAL EDUCATION AND TRAINING: FINAL EXAMS ¹

FEDERAL PET DIPLOMA	Men	2017 Women	Total	2016 Total	2015 Total
Bereichsleiter/-in Hotellerie-Hauswirtschaft	4	74	78	75	72
Bereichsleiter/-in Restauration	8	28	36	28	31
Bergführer/-in	21	2	23	18	23
Cabin Crew Member	17	31	48	40	47
Chef de Réception	–	1	1	18	–
Chefkoch/Chefköchin	104	27	131	159	111
Fachmann/-frau im Pisten und Rettungsdienst	–	–	–	–	25
Gastro-Betriebsleiter/-in	41	39	80	57	77
Schneesportlehrer/-in	72	38	110	107	114
Seilbahnfachmann/-frau	47	–	47	34	12
Tourismus-Assistent/-in	7	27	34	28	44
Wanderleiter/-in	4	3	7	9	5

ADVANCED FEDERAL PET DIPLOMA

Manager/-in öffentlicher Verkehr	–	–	–	19	–
Gastro-Unternehmer/-in	14	8	22	22	17
Küchenchef/-in	12	1	13	37	4
Leiter/-in Gemeinschaftsgastronomie	–	–	–	6	1
Leiter/-in Hotellerie – Hauswirtschaft	–	–	–	2	–
Restaurationsleiter/-in	–	–	–	8	–
Manager/-in Gesundheitstourismus und Bewegung	–	–	–	–	1
Seilbahnmanager/-in	1	–	1	–	3

DIPLOMAS FROM PET COLLEGES

Betriebsleitung Facility Management	2	23	25	29	33
Hotellerie und Gastronomie	165	238	403	383	417
Tourismus	59	197	256	198	173

BACHELOR / MASTER OF UNIVERSITIES OF APPLIED SCIENCES

Bachelor Hospitality Management	214	345	559	364	544
Master Hospitality Management	24	25	49	–	–
Bachelor Tourismus	58	177	235	183	191

¹ The figures for 2018 were not available at the time of printing.

INTERNATIONAL

TOURIST ARRIVALS

International tourist arrivals grew by a remarkable 5.6% in 2018 to reach a total of 1,403 billion, according to the latest UNWTO World Tourism Barometer. This represents a consolidation of the strong results of 2017 and exceeds the rate of 4% or higher growth recorded every year since 2010.

2018 was characterised by sustained growth in many destinations and an ongoing recovery in those that suffered decreases in previous years. All regions enjoyed an increase in international arrivals, led by the Middle East (+10%) and Africa (+7%). Asia and the Pacific as well as Europe each went up 6%, while the Americas grew by 3%.

	International arrivals in million		Change in %	
	2018 ¹	2017	2018 ¹ /17	2017/16
Europe	712.6	674.5	5.7	8.6
Northern Europe	78.4	78.3	0.2	6.0
Western Europe	203.6	192.7	5.6	6.1
Central/Eastern Europe	144.4	136.0	6.2	5.7
Southern/Mediter. Europe	286.2	267.5	7.0	12.8
Asia and Pacific	342.6	323.0	6.1	5.6
North-East Asia	168.4	159.5	5.6	3.4
South-East Asia	129.3	120.4	7.4	8.7
Oceania	17.0	16.6	2.7	6.0
South Asia	27.9	26.6	5.0	5.6
Americas	217.2	211.1	2.9	4.9
North America	142.8	137.0	4.2	4.2
Caribbean	25.4	26.0	-2.3	3.0
Central America	10.9	11.1	-1.8	4.6
South America	38.1	37.0	3.2	8.9
Africa	67.1	62.6	7.3	8.2
North Africa	23.9	21.7	10.4	14.7
Subsaharan Africa	43.2	40.9	5.6	5.1
Middle East	63.6	57.6	10.3	4.1
World	1403	1329	5.6	7.0

¹ Estimate

Source: World Tourism Organization (UNWTO)

TOP DESTINATIONS

Rank	Country of destination	International arrivals in million		Change in %	
		2017	2016	2017/16	2016/15
1	France	86.9	82.7	5.1	-2.1
2	Spain	81.9	75.3	8.7	10.5
3	United States	76.9	76.4	0.7	-1.8
4	China	60.7	59.3	2.5	4.2
5	Italy	58.3	52.4	11.2	3.2
6	Mexico	39.3	35.1	12.0	9.3
7	United Kingdom	37.7	35.8	5.1	4.0
8	Turkey	37.6	30.3	24.1	-23.3
9	Germany	37.5	35.6	5.2	1.8
10	Thailand	35.4	32.5	8.8	8.7
35	Switzerland	11.1	10.4	7.0	11.8

Rank	Country of destination	International tourism receipts in billion US-\$		Change in % based on local currency	
		2017	2016	2017/16	2016/15
1	United States	210.7	206.9	1.9	0.0
2	Spain	68.1	60.5	10.3	7.2
3	France	60.7	54.5	9.0	-6.3
4	Thailand	57.5	48.8	12.0	12.2
5	United Kingdom	49.0	47.9	7.4	8.1
6	Italy	44.2	40.2	7.7	2.3
7	Australia	41.7	37.0	9.3	9.3
8	Germany	39.8	37.5	4.2	1.7
9	Macao (China)	35.6	30.4	17.6	-1.8
10	Japan	34.1	30.7	14.4	10.4
24	Switzerland	16.3	16.0	1.6	0.1

Source: World Tourism Organization (UNWTO)

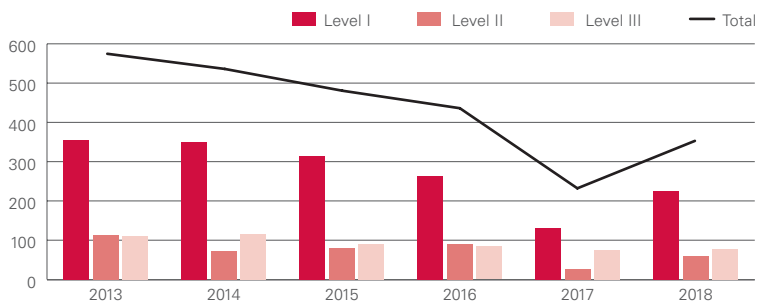
QUALITY PROMOTION

QUALITY PROGRAMME OF SWISS TOURISM



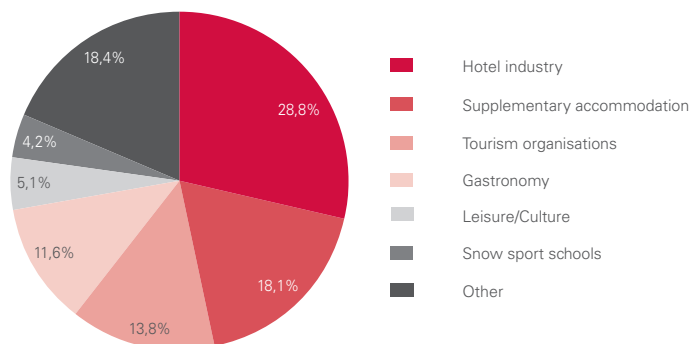
The Quality Programme of Swiss Tourism promotes the development of quality and quality assurance in tourism operations. The three-level programme is supported by eleven industry organisations. In 2017 the programme was revised and published with new contents.

QUALITY LABELS AWARDED



Since 1998 a total of 12 855 individuals have been trained and 9 173 quality labels have been granted. Compared to the previous year, the Jura region reported the largest increase in valid Q-labels (+16%) in 2017, while Taxis (+8.7%) was the industry with the highest growth.

LABELS PER INDUSTRY 2018



Status as of 31.12.2018

Source: Swiss Tourism Federation

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 2018, 26 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 2018 this quality label was awarded to 10 destinations.

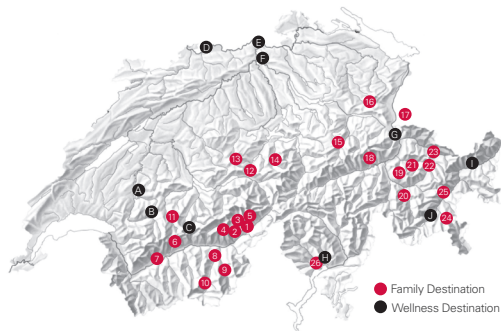
DESTINATIONS CARRYING THE LABEL

FAMILY DESTINATION 2016–2018

Valais	1 Fiesch 2 Riederalp 3 Bettmeralp 4 Blatten–Belalp 5 Bellwald 6 Crans-Montana 7 Nendaz 8 Grächen 9 Saas-Fee 10 Zermatt
Bernese Oberland	11 Lenk 12 Hasliberg
Lucerne/ Lake Lucerne	13 Sörenberg 14 Engelberg
Eastern Switzerland/Liechtenstein	15 Braunwald 16 Wildhaus-Alt St. Johann 17 Malbun
Graubünden	18 Flims, Laax 19 Lenzerheide 20 Savognin 21 Arosa 22 Davos 23 Klosters 24 Pontresina 25 Zuoz
Ticino	26 Ascona–Locarno

WELLNESS DESTINATION 2018–2020

Fribourg Region	A Charmey	Zurich Region	F City of Baden
Bernese Oberland	B Gstaad Saanenland	Eastern Switzerland	G Bad Ragaz
Valais	C Leukerbad	Ticino	H Ascona–Locarno
Aargau Region	D Rheinfelden	Graubünden	I Engadin Scuol
	E Bad Zurzach		J St. Moritz



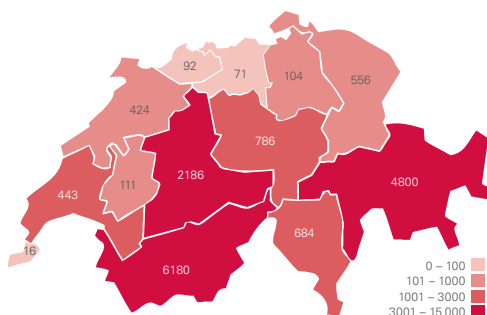
Source: Swiss Tourism Federation

CLASSIFICATION OF HOLIDAY APARTMENTS AND GUEST ROOMS



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

AWARDED CERTIFICATES 2018



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 accompanies lodging companies on their way to a sustainable company management. Hotels, hostels and clinics which surpass their responsibility for sustainable action will be rewarded. The integral support contains the five areas such as management, ecology, regionalism, social awareness and economic efficiency. With the help of a measure catalogue as well as supported calculations and analyses practical improvement possibilities are indicated. The companies are awarded the bronze, silver, gold or platinum level according to their performance of sustainability. There is also the possibility of a combined certificate with the Quality Program of Swiss Tourism.

Year	2018	2017	2016	2015	2014
Certified companies	60	58	56	57	55

Source: ibex fairstay



EU ENVIRONMENTAL LABEL FOR LODGING ESTABLISHMENTS

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

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

Year	2018	2017	2016	2015	2014
Certified companies	9*	50	50	49	56

* Decline due to end of contract with a major partner

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.myfarm.ch, info@myfarm.ch.

Umbrella organisation for the marketing and coordination of agritourist services in Switzerland with around 250 members.

Association of postgraduate Hoteliers and Restaurateurs SHV/Hotelmanager NDS HF

Secretariat, Kapplerstrasse 70, 9642 Ebnet-Kappel, phone +41 (0)79 833 81 75, www.vdh.swiss, welcome@vdh.swiss.

Networking, further education and friendship care for students of the postdiploma course Unternehmensführung resp. Nachdiplomstudium NDS HF of hotelleriesuisse.

Association of Swiss Tourism Managers (ASTM)

c/o Schmid Pelli & Partner AG, Weinbergstrasse 164, 8006 Zurich, phone +41 (0)43 810 06 06, www.vstm.ch, info@vstm.ch.

Representation of the professional interests of swiss tourism managers. Professional development, network maintenance, 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 15 member shipping companies.

Bed and Breakfast Switzerland

Sonnenweg 3, 4144 Arlesheim, phone +41 (0)61 703 00 83, www.swissbnb.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 (CI-HSTM)

c/o IST AG, Josefstrasse 59, 8005 Zürich, phone +41 (0)44 440 30 90, www.ist-edu.ch, zurich@ist-edu.ch.

Safeguarding common interests towards the public authorities, associations and the general public, promotion of tourism management education and training in Switzerland.

Foundation 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, canoeing, winter hiking, snowshoe trekking, cross-country skiing and sledging.

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.

Groups AG | Feel at home – together

Spitzackerstrasse 19, 4410 Liestal, phone +41 (0)61 926 60 00, www.groups.swiss, contact@groups.swiss.

Organisation of group accommodations and group hotels 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.

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 hospitality industry and the trade association which represents the interests of the nationally and internationally oriented hospitality establishments. The association is a member of the European umbrella association Hotrec as well as the 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 of 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 – GoSnow.ch

Finkenhubelweg 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 a 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. The national umbrella organisation of Swiss campsites with around 180 members for the promotion of camping holidays. Advising members on all matters relating to camping. Comprehensive evaluation and classification of campsites to maintain and improve quality.

Swiss Centre for mountain regions (SAB)

Seilerstrasse 4, 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, 3007 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, www.parks.swiss, info@parks.swiss.

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 18 parks characterize themselves by their natural and cultural landscapes. They are engaged to protect and to valorize them.

SWISS SNOWSPORTS

Hühnerhubelstrasse 95, 3123 Belp, phone +41 (0)31 810 41 11, fax +41 (0)31 810 41 12, www.snowsports.ch, www.swiss-ski-school.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.stv-fst.ch, info@stv-fst.ch.

To safeguard the interests of those responsible for tourism in Switzerland and to participate in all tourism policy decisions; to provide information about the importance of tourism and to contribute to tourism research.

Swiss Travel Savings Fund (Reka) Cooperative

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

The Swiss Travel Fund (Reka) Cooperative is a strong, modern organization with a non-profit-making social tourism goal. It aims to enable as many families in Switzerland as possible to enjoy holidays and leisure. With its two business spheres, Reka Money and Reka Holidays, it has achieved a unique Swiss product mix.

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 individual travellers, groups, schools and families.

Thermal Spas and Health Hotels Switzerland

Tribschenstrasse 7, 6005 Luzern, phone +41 (0)71 350 14 14, www.kuren.ch, www.thermenschweiz.ch, info@kuren.ch. Representing the interests of thermal spas, convalescent homes, clinics of rehabilitation and health hotels.

Public corporations

Swiss Association for Hotel Credit (SGH)

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

Financing, appraisals, consulting.

Switzerland Tourism (ST)

Morgartenstrasse 5, 8004 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, www.seco.admin.ch, tourismus@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, holiday homes, group accommodation and camping places, tourism balance of payments, tourism satellite account and travel behavior).

Institutes of higher education

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 digital transformation and online marketing, monitoring and management tools in tourism (observatory), service design, market research and market intelligence.

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

Comercialstrasse 22, 7000 Chur, phone +41 (0)81 286 24 24, fax +41 (0)81 286 39 49, www.itf.ch, itf@htwchur.ch.
BSc (full- and part-time) and MSc study programmes as well as further education (CAS Event Management, CAS Tourismus 4.0) in tourism and leisure management. Applied research and consultancy in the areas of service innovation, Tourism 4.0, and the management of tourism real estate and infrastructure, taking into account sustainable development.

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.
Academic teaching, research and services, in particular concerning regional development, experience economy and tourism, macroeconomics and tourism as well as environmental economics and tourism.

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,
www.visiteurope.com, info@visit-europe.com.

EUROSTAT

Joseph Bech Building, 5, rue Alphonse Weicker, 2721 Luxembourg, phone +35 2 4301 1, fax +35 2 4301 35349,
www.ec.europa.eu/eurostat, estat-esac@ec.europa.eu.

Hotels, Restaurants & Cafés in Europe (HOTREC)

36-38 Rue Dautzenberg, 1050 Brussels, Belgium, phone +32 2 548 90 00, fax +32 2 502 41 73, www.hotrec.eu,
hotrec@hotrec.eu.

World Tourism Organization (UNWTO)

Calle Capitán Haya 42, 28020 Madrid, Spain, phone +34 91 567 81 00, fax +34 91 253 40 36, www.unwto.org, info@unwto.org.

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