

Office fédéral de la statistique Neuchâtel
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D3

Swiss Tourism in Figures

2003

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Edited by

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- GastroSuisse
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The data in this publication are based on 2002 figures where available at the editorial deadline; otherwise, the most recent ones are given. The publication is also available on Internet **http://www.swisstourfed.ch**.

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Erratum

Schweizer Tourismus in Zahlen 2003
Le tourisme suisse en chiffres 2003
Swiss Tourism in Figures 2003

Tourismus ist unsichtbarer Export

Wenn Auslandgäste in der Schweiz touristische Dienstleistungen beanspruchen, hat dies auf die schweizerische Zahlungsbilanz die gleiche Wirkung wie der Export von Waren. Dem Tourismus sind 6% der Exporteinnahmen zuzuschreiben.

Exporteinnahmen nach Branchen [1]	1992 Mrd. Fr.	1998 Mrd. Fr.	2001 Mrd. Fr.	2002 Mrd. Fr.
1. Metall-, Maschinenindustrie	38,0	47,7	54,9	50,3
2. Chemische Industrie	21,3	31,3	41,8	44,8
3. Tourismus (Fremdenverkehrsbilanz)	*11,5*	*11,6*	*12,7*	*12,2*
4. Uhrenindustrie	7,4	8,4	10,6	10,6
5. Textilindustrie	4,6	4,0	3,9	3,7

1) ohne Kapital- und Arbeitseinkommen aus dem Ausland

Quelle: Bundesamt für Statistik

Le tourisme est un secteur d'exportation invisible

Lorsque des touristes étrangers font appel à des services touristiques en Suisse, ceci se répercute sur la balance des paiements suisse de la même manière que l'exportation de marchandises. 6% des recettes d'exportation proviennent du tourisme.

Recettes d'exportation par branche [1]	1992	1998	2001	2002
		Milliards de fr.		
1. Métallurgie, industrie des machines	38,0	47,7	54,9	50,3
2. Industrie chimique	21,3	31,3	41,8	44,8
3. Tourisme (balance touristique)	*11,5*	*11,6*	*12,7*	*12,2*
4. Industrie horlogère	7,4	8,4	10,6	10,6
5. Industrie textile	4,6	4,0	3,9	3,7

1) Sans les revenus des capitaux placés à l'étranger ni les revenus des travailleurs suisses à l'étranger

Source: Office fédéral de la statistique

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. 6 percent of Switzerland's export revenue come from tourism.

Export revenue by industry [1]	1992	1998	2001	2002
		In billion Swiss francs		
1. Metal and machine industry	38,0	47,7	54,9	50,3
2. Chemical industry	21,3	31,3	41,8	44,8
3. Tourism (Tourism balance of payments)	*11,5*	*11,6*	*12,7*	*12,2*
4. Watchmaking industry	7,4	8,4	10,6	10,6
5. Textile industry	4,6	4,0	3,9	3,7

1) Excl. income from capital abroad and work abroad

Source: Swiss Federal Statistical Office

Tourism – an important part of the economy

Tourism generates income

Domestic and international tourism are important factors in the Swiss economy. Of a total revenue of 21.9 billion Swiss francs in 2002, 9.7 billion (or 43%) came from domestic tourism. Expenditure by foreign visitors in Switzerland added some 12.2 billion Swiss francs (3% of the Gross Domestic Product).

Total tourism revenue	1992	1998	2001	2002
		in billion Swiss francs		
From domestic tourists	8.5	9.1	9.7	9.7
From foreign tourists	11.5	11.6	12.7	12.2
Total	20.0	20.7	22.4	21.9
Tourism's share of Swiss Gross Domestic Product	5.8%	5.4%	5.4%	5.3%

Source: Federal Statistical Office

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. 9 percent of Switzerland's export revenue come from tourism.

Export revenue by industry[1)]	1992	1998	2001	2002
		in billion Swiss francs		
1.Metal and machine industry	21.3	31.3	41.8	44.8
2.Chemical industry	38.0	47.7	54.9	41.4
3.Tourism (Tourism balance of payments)	*11.5*	*11.6*	*12.7*	*12.2*
4.Watchmaking industry	7.4	8.4	10.6	10.6
5.Textile industry	4.6	4.0	3.9	3.7

1) Excl. income from capital abroad and work abroad
Source: Federal Statistical Office

Overnight tourists account for 70% of the revenue

The tourism balance of payments shows the revenue from foreign tourists in Switzerland and the expenditure of Swiss tourists abroad. Calculations are based on a mixture of statistical data including frequency, turnover and prices, additional statistics from foreign and domestic authorities as well as estimates.

Tourism balance of payments

Revenue/ Expenditure	Revenue from foreign tourists			Expenditure of Swiss tourists abroad			Income surplus		
	in billion Swiss francs			in billion Swiss francs			in billion Swiss francs		
	1998	2001	2002	1998	2001	2002	1998	2001	2002
Business & vacation stays	6.7	7.1	6.5	8.4[1]	9.0[1]	8.9[1]	–0.2[1]	–0.2[1]	–0.6[1]
Educational & medical stays	1.5	1.7	1.8						
Excursionists, transit visitors	2.3	2.6	2.7	1.1	1.1	1.4	1.2	1.5	1.3
Other tourism	0.4	0.4	0.1	0.4	0.4	0.0	0.0	0.0	0.1
Consumption expenditure of border-zone inhabitants	0.8	1.0	1.1	0.0	0.0	0.0	0.8	1.0	1.1
Total	11.6	12.7	12.2	9.9	10.5	10.3	1.7	2.2	1.9

1) Incl. educational and medical stays
2) Since 2002, the expenditure of people living in border zones has been included under the heading «Daily traffic and transit traffic»
Source: Federal Statistical Office

Hotel guests from abroad spend some 5.5 billion francs

Expenditure by foreign visitors staying overnight in tourist accommodation establishments totalled 6.5 billion francs in 2002, of which four fifths were spent by tourists staying in hotels.

Overnight tourists Year 2002	Expenditure in millions of francs for:			
	lodging	meals	incidentals	total
in hotels	2589.8	1288.3	1622.6	5500.7
in vacation apartments	184.4	222.2	205.5	612.1
at camp grounds	21.0	42.1	38.5	101.6
in group accommodation	37.6	49.0	40.6	127.2
in youth hostels	10.2	8.9	4.2	23.3
with friends and relatives	*	*	*	170.8
Total	*	*	*	6535.7

Source: Federal Statistical Office

Average expenditure of a foreign tourist per overnight stay

Overnight tourists Year 2002	Expenditures in francs for:			
	lodging	meals	incidentals	total
in hotels	144	72	90	306
in vacation apartments	24	9	27	59
at camp grounds	13	26	24	62
in group accommodation	19	25	21	65
in youth hostels	27	24	11	63
with friends and relatives	*	*	*	33

Source: Federal Statistical Office

Foreign guests in Switzerland spend money not only in hotels and restaurants, but also in other businesses. In 2002, for instance, they spent the following estimated amounts on:

Gasoline/Petrol	645 million Swiss francs
Tobacco	161 million Swiss francs
Sweets	307 million Swiss francs
Inland water transportation	20 million Swiss francs
Crafts, souvenirs and postcards	96 million Swiss francs
Taxi fares	84 million Swiss francs
Sights or points of interest	22 million Swiss francs

Source: Federal Statistical Office

These expenses are included in the previous tables under «incidentals».

Tourism and the Swiss economy

Tourism is one of the main branches of the Swiss economy, but, because of the varied nature of tourism-related production, it has been difficult to date to assess its many economic effects.

The «tourism satellite account (TSA)[1)]» fills this gap, providing vital data on tourism's role in the Swiss economy, particularly tourism's contribution to Switzerland's overall economy in terms of gross added value and jobs, and the economic importance of the various categories of visitor.

The first Swiss «tourism satellite account» covers reference year 1998. In line with current international standards in this field, the results of the satellite account expressed in terms of added value measure only the direct effects of tourism[2)]. To evaluate the global economic impact of tourism in Switzerland, the indirect effects of tourism should also be taken into account, i.e. intermediate consumption of tourism businesses (purchases of goods and equipment, rental, transport and energy costs, maintenance and repair costs, advertising, etc.) as well as investments (variations in capital) by tourism providers, or even tourism multipliers (revenue obtained in tourism which triggers consumption expenditure).

The Swiss State Secretariat for Economic Affairs (SECO) is currently conducting a study to calculate the indirect effects of tourism, on the basis of the work done for the 1998 satellite account.

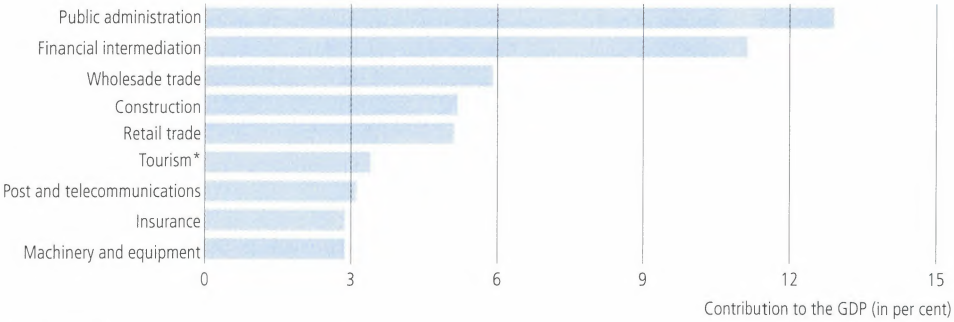
One of the most important branches of the Swiss economy

In 1998, tourism was directly responsible for annual expenditure of 30.6 billion Swiss francs, so that the sector generated 12.9 billion in added value and accounted for 3.4% of the country's gross domestic product (GDP), placing it in sixth position among branches of the Swiss economy.

1) The tourism «satellite account» owes its name to the fact that it does not appear as such in the National Accounts or in the official nomenclatures used by statistics. The information had to be reconstituted from the tourism-related components of existing sectors and concentrated in a parallel account outside the nomenclature, which is perfectly compatible with the National Accounts.

2) Due to incomplete data, the first tourism satellite account does not take into account all the components of the direct effects of tourism.

Contribution of tourism to the GDP in 1998



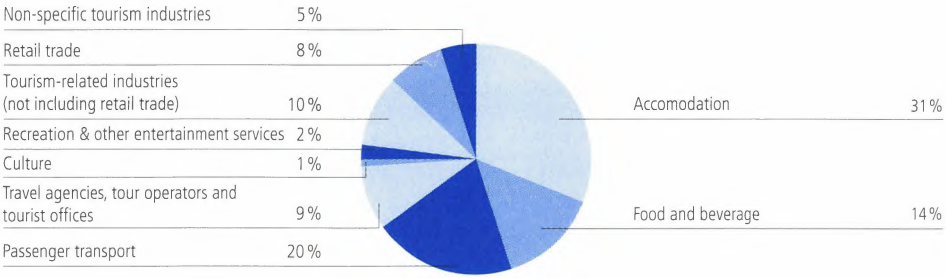
* direct effects

Source: TSA, Swiss Federal Statistical Office, 2003

Added value of tourism: Many branches of the economy benefit from tourism

Accounting for 31% of tourism's added value, the lodging sector is the main economic branch of tourism. The lodging and food and beverage serving services together account for 45% of tourism's added value. Over half of tourism's added value comes from other economic sectors.

Contribution of economic sectors to added value in 1998



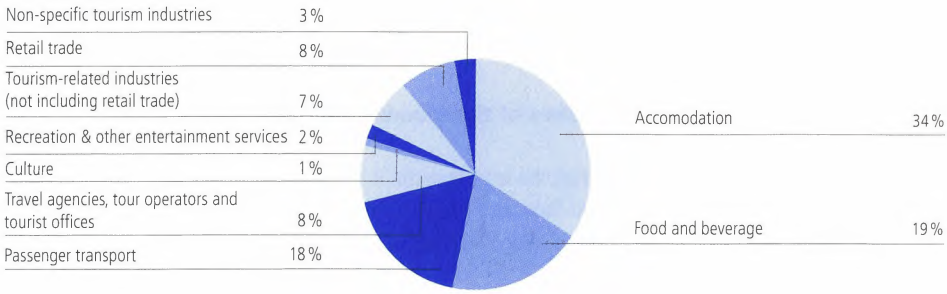
Direct tourism gross value added in Switzerland: CHF 12900 million (= 3.4% of GDP)

Source: TSA, Swiss Federal Statistical Office, 2003

Tourism creates jobs

The tourism sector is an important provider of jobs. It is estimated that, overall, one person in twelve is involved in it directly or indirectly. In mountain areas, the proportion is much higher than in urban areas. The Swiss tourism satellite account for 1998 provides exact figures for the number of jobs directly generated by tourism (full-time equivalent employment). The figures given below therefore replace the estimates made hitherto.

166 000 jobs directly generated by tourism in Switzerland in 1998



Direct tourism employment in Switzerland: 165 500 full-time equivalent employment (=5.2% of total employment)

Source: TSA, Swiss Federal Statistical Office, 2003

Foreign tourists accounted for 47% of tourist expenditure in 1998

	Mio CHF	%
Tourism consultation	30610	100
International visitors	14500	47
Same-day visitor	3120	10
Tourists (overnight visitors)	11380	37
Domestic visitor	9790	32
Same-day visitor	4890	16
Tourists (overnight visitors)	4900	16
Domestic business trips	1790	6
Use of second homes on own account or free of charge	690	2
Other components	3840	13

Accommodation: Hotels and supplementary accommodation

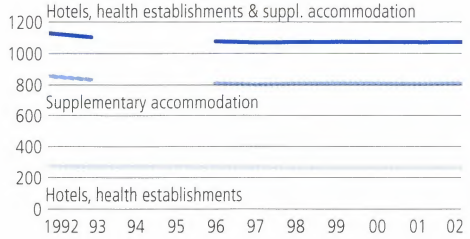
Overview of the accommodation sector

Tourism statistics subdivide accommodation options into hotel accommodation, health establishments and supplementary accommodation.

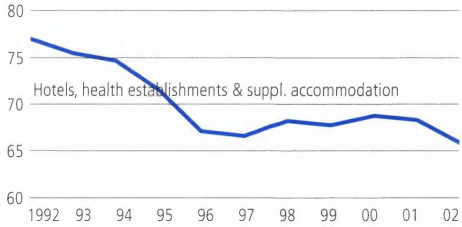
Hotel accommodation	= hotels, boarding houses, aparthotels, inns/ guesthouses, motels
Health establishments	= sanatoria, clinics, spas, convalescent homes, with medical or similar care
Supplementary accommodation	= chalets and apartments, private rooms, camping sites, group accommodation, youth hostels.

The statistics of supplementary accommodation was discontinued on conclusion of the surveys for the tourism year 1992/1993 and relaunched on 1st May 1996 in a slightly modified manner. During the three interim years the number of overnight stays at the various accommodation establishments was estimated. Starting from 1997 (for the first time since 1993), results entirely based on the modified surveys are available.

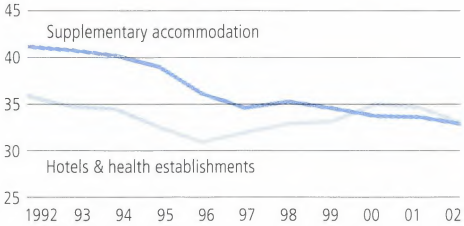
Beds (in thousands)



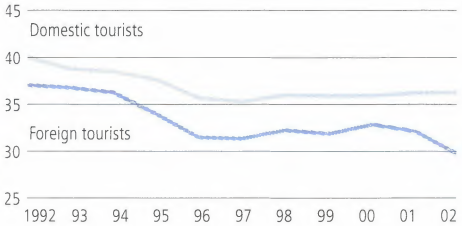
Total overnight stays (in millions)



Overnight stays in hotels, health establishments, supplementary accommodation (in millions)



Overnight stays of domestic and foreign tourists (in millions)



Source: Federal Statistical Office

Swiss guests account for the lion's share

Overnight stays in hotels, health establishments and supplementary accommodation (in millions)

Country of residence	1992	1997	2001	2002	Winter[1] 2000/01	Summer[1] 2001	Winter[1] 2001/02	Summer[1] 2002
Switzerland	40.0	35.3	36.1	36.3	16.3	19.8	16.3	19.9
Total of foreign countries	37.0	31.3	32.1	29.6	15.2	17.1	13.9	15.7
Germany	16.0	14.0	13.3	12.0	7.0	6.3	6.4	5.7
United Kingdom	2.6	1.9	2.6	2.4	1.3	1.3	1.2	1.2
France	2.3	1.8	1.9	1.8	1.0	0.9	0.9	0.9
Italy	2.0	1.2	1.4	1.4	0.6	0.8	0.6	0.8
Belgium	2.1	1.7	1.6	1.5	0.8	0.8	0.7	0.7
Netherlands	3.4	2.6	2.8	2.5	1.2	1.6	1.1	1.4
Nordic countries[2]	0.7	0.5	0.6	0.5	0.3	0.3	0.3	0.2
Russia, Federation[3]	...	...	0.2	0.3	0.1	0.1	0.1	0.1
Spain	0.6	0.4	0.4	0.4	0.2	0.3	0.1	0.2
Austria	0.5	0.4	0.4	0.4	0.2	0.2	0.2	0.3
Other countries Europe	1.4	1.5	1.3	1.3	0.6	0.7	0.7	0.7
Europe total (excl. Switzerland)	31.6	26.0	26.5	24.5	13.3	13.3	12.3	12.2
United States	2.1	1.9	2.1	1.8	0.8	1.4	0.6	1.2
Canada	0.2	0.2	0.2	0.2	0.1	0.1	0.1	0.1
Brazil	0.1	0.2	0.1	0.1	0.0	0.1	0.1	0.1
Other countries America	0.3	0.1	0.3	0.2	0.1	0.2	0.0	0.1
America total	2.7	2.4	2.7	2.3	1.0	1.8	0.8	1.5
Japan	0.8	0.9	0.9	0.7	0.2	0.7	0.1	0.6
Israel	0.3	0.3	0.3	0.2	0.1	0.2	0.1	0.2
India	0.1	0.1	0.2	0.2	0.0	0.2	0.0	0.2
Other countries Asia	0.8	1.0	0.9	1.1	0.4	0.6	0.4	0.6
Asia total	2.0	2.3	2.3	2.2	0.7	1.7	0.6	1.6
Africa	0.4	0.3	0.3	0.3	0.1	0.2	0.1	0.2
Australia, Oceania	0.3	0.3	0.3	0.2	0.1	0.2	0.1	0.2
Other overseas countries	0.7	0.6	0.6	0.5	0.2	0.4	0.2	0.4
Total	77.0	66.6	68.2	65.8	31.5	36.9	30.2	35.6

1) Winter: November–April; Summer: May–October
2) Denmark, Finland, Norway, Sweden and since 1.1.1994 Iceland
3) Since 1.1.1999

Source: Federal Statistical Office

Accommodation: Hotels

The hotel industry is the major factor in Switzerland's tourism industry. As early as 1912 – prior to the outbreak of World War I – there were 211 000 hotel beds in Switzerland, and by 2002 this figure had risen to 259 000. The number has not significantly changed in recent years, but quality has been adapted to the changing demands of tourism.
In the statistics, data for hotels and health establishments are sometimes listed separately. To simplify matters, the figures on the following pages include hotel accomodation only.

5640 hotels with 259 000 beds

Year	Number of hotels	Number of beds	
		existing[1]	available[1]
1992	6300	261 900	222 700
1997	5900	261 100	219 500
2001	5700	260 100	220 100
2002	5600	259 000	218 500

1) Tourism statistics distinguish between existing and available hotel beds. «Existing beds» means the total of all hotel beds in Switzerland. Some hotels (e.g. in winter sports resorts) operate on a seasonal basis. The hotel beds actually available are reported as «available hotel beds».
Source: Federal Statistical Office

Small and medium-sized hotels predominate

2002				
Size of establishment	Number of establishments			
	in figures	cumulated	in %	cumulated
up to 20 beds	2166	2166	38.4	38.4
21–50 beds	1957	4123	34.7	73.1
51–100 beds	980	5103	17.4	90.5
more than 100 beds	537	5640	9.5	100.0
up to 10 rooms	2123	2123	37.6	37.6
11–20 rooms	1418	3541	25.1	62.8
21–50 rooms	1459	5000	25.9	88.7
51–100 rooms	484	5484	8.6	97.2
more than 100 rooms	156	5640	2.8	100.0

Source: Federal Statistical Office

Constant upgrading of hotels

Equipment of rooms				
Year	Rooms with running water		Rooms without running water	Total
	with bath/shower	without bath/shower		
1992	115400	26200	2700	144300
1997	120700	20000	2300	143000
2001	123100	16500	2200	141800
2002	123000	15500	2100	140600

Source: Federal Statistical Office

In 62% of all hotels, an overnight stay costs between 50.– and 150.–

Rate per person/night in Sfr.	Number of rooms			
	1992	1997	2001	2002
up to 49.99	27700	15800	18400	19000
50.– to 99.99	62300	53900	51500	50500
100.– to 149.99	54400	37000	36000	35800
150.– and more		35000	34700	34700

Source: Federal Statistical Office

Two thirds of the overnight stays in the highest category are due to foreign guests

Rate per person/night in Sfr.	Overnight stays Swiss	Overnight stays Foreigners	Overnight stays Total
up to 49.99	1862730	1386653	3249383
50.– to 99.99	5485463	4521273	10006736
100.– to 149.99	3928786	5387749	9316535
150.– and more	2918881	6471862	9390743

Source: Federal Statistical Office

Allocation of turnover and operating expenses in percent (2001)

The Swiss Association for Hotel Credit (SGH) publishes reliable annual average figures on over 500 establishments in Switzerland. The figures published on this page are based on these surveys and show average values. There are, of course, considerable differences between seasonal and year-round establishments and between mountain and lakeside hotels. Following a period of continuous growth in the number of overnight stays and the results in the years 1997 to 2000, a decline, which was severe in some areas, set in during 2001. Further details are available on request from the SGH

Hotel category	*****	****	***	** + *
Earnings on food and beverages	41.7	46.8	58.1	70.5
Earnings on accommodation	53.7	49.5	39.9	28.1
Earnings on other services	4.6	3.7	2.0	1.4
Total turnover	100.0	100.0	100.0	100.0
Expenditure on goods (incl. services)	14.7	18.9	22.3	26.1
Gross profit I	85.3	81.1	77.7	73.9
Personnel expenses	38.8	38.5	35.3	30.1
Gross profit II	46.5	42.6	42.4	43.8
Operating expenses	15.5	14.1	13.3	13.1
Operating result I	31.0	28.6	29.1	30.7
Management expenses	5.6	4.7	7.1	9.3
Operating result II	25.4	23.9	22.0	21.4
Maintenance	7.3	5.3	4.1	3.8
Gross operating profit	18.1	18.6	17.9	17.6
Financial and investment expenses	7.2	9.4	9.3	10.0
Operating cash flow	11.0	9.2	8.6	7.6
Non-recurring earnings and expenses	+3.2	+2.1	+0.4	+0.7
Corporate cash flow	14.2	11.3	9.1	8.3
Depreciation	11.3	10.6	8.7	9.8
Corporate result	2.8	0.7	0.4	−1.5

Level of indebtedness in the hotel trade in percent

Hotel category	*****	****	***	** + *
Level of self-financing	28.8	9.7	5.6	6.7
Level of indebtedness	71.2	90.3	94.4	93.3

Source pages 13–14: Swiss Association for Hotel Credit (Statistical Year 2001)

Important key figures according to hotel category

Hotel category	*****	****	***	** + *
Profit and loss account				
Average number of beds	224	105	61	39
Bed occupancy rate on days when open (in %)	58.1	59.6	49.3	36.1
Average duration of stay (days)	3.7	3.5	3.4	2.8
	Fr.	Fr.	Fr.	Fr.
Average accommodation rate	236	122	78	75
Accommodation earnings per bed	32484	21148	11079	6625
Average operating income	14679000	4878000	1711000	877000
Balance sheet	Fr.	Fr.	Fr.	Fr.
Indebtedness per bed	92066	95860	63478	55498
Investment per bed	116034	100294	64349	55981
Investment per room	212398	185758	121526	116369
Average balance sheet total	30025000	10718500	3827000	2046000

Hotel-Panel 2000

Meaning and purpose of the Hotel Panel

The Hotel Panel is a joint project of the Swiss Association for Hotel Credit (SGH), the Federal Statistical Office (FSO) and the Swiss Hotel Association (SHV) which is repeated each year. For the Hotel Panel 2000, the Federal Statistical Office conducted a random survey of 189 establishments from among all Swiss hotels which provides statistically representative results and allows well-based statements for the Swiss hotel trade as a whole. These hotel-specific structure key figures are also included in the value added statistics within the framework of the national accounts.

These key figures provide an overview of the financial situation of the Swiss hotel trade as well as its economic contribution and make possible a cross comparison with other branches.

Comments on the Hotel Panel figures for 2000

According to the extrapolated Hotel Panel data for 2000, the Swiss hotel industry had a total turnover of some CHF 8.70 billion in 2000, of which CHF 3.6 billion or some 31 percent are attributable purely to overnight accommodation. Taking Switzerland as a whole, the Swiss hotel industry incurs wage costs totalling some CHF 3.54 billion. The hotel industry is an intensively service-oriented branch; average staff

expenses amount to 35.1% of the total turnover[1]. The degree of concentration on property is considerable with fixed assets accounting for 82.8% of the total assets. As a result of the high proportion of fixed assets (around CHF 15 billion), its levels of depreciation, maintenance and finance are extremely high. Only 13% (or some CHF 2.6 billion all told) of the invested capital is self-financed. Happily, the Swiss hotel industry has succeeded in reducing borrowed capital by some CHF 2.7 billion and increasing equity capital from 5% to 13% in the period between 1997 and 2000.

1) This figure may be understated due to the fact that owners' salaries are not consistently reported.

Projection for the hotel trade as a whole

The whole of Switzerland (all regions)	1997	1998	1999	2000
Total turnover in CHF 1000	7536332	8297767	8358187	8658510
Personnel expenses in CHF 1000	2995104	3454651	3463358	3539653
Profit/loss in CHF 1000	278106	296694	283179	380740
Current assets in CHF 1000	1387700	1631567	1553457	1713025
Fixed assets in CHF 1000	17323409	15175978	14564506	14933739
Fixed assets in % of the total capital	88.20%	85.40%	83.20%	82.80%
Borrowed capital	16755098	14663961	13436487	14084036
Equity capital in CHF 1000	1956011	2143584	2681477	2562727
Equity capital in % of the total capital	5.00%	10.40%	12.90%	13.00%

Productivity and gross value added

It was possible to achieve a highly satisfactory massive increase in productivity (average turnover per employee and year) to CHF 114590 (previous year CHF 103870). Although the wage costs per employee rose by 4.8% to CHF 44947 compared to the previous year, personnel expenses as a proportion of turnover account for 35.1%, some 1.2% less than in 1999, which suggests more efficient use of personnel. This is also confirmed by the increase in gross value added of some CHF 6000.– to almost CHF 67000.–.

Turnover per employee	100617	103414	103870	114590
Gross value added per employee	59978	59263	60830	66882
Personnel expenses per employee	40383	42955	42897	44947

The majority of hotel guests are foreigners

Overnight stays by country of residence of guests (in millions)				
Country of residence	1992	1997	2001	2002
Switzerland	14.0	12.8	14.3	14.2
Total of foreign countries	20.2	18.0	19.3	17.8
Germany	6.8	6.2	6.3	5.5
United Kingdom	1.8	1.4	2.0	1.9
France	1.4	1.1	1.2	1.2
Italy	1.4	0.8	0.9	0.9
Belgium	1.0	0.8	0.7	0.7
Netherlands	0.9	0.8	0.9	0.8
Nordic countries [1]	0.5	0.4	0.4	0.4
Russia, Federation [2]	...	...	0.2	0.2
Spain	0.4	0.3	0.3	0.3
Austria	0.4	0.3	0.3	0.3
Other countries Europe	0.9	1.2	1.1	1.0
Europe total (excl. Switzerland)	15.5	13.3	14.3	13.2
United States	1.9	1.7	1.9	1.6
Canada	0.2	0.1	0.2	0.2
Brazil	0.1	0.1	0.1	0.1
Other countries America	0.2	0.3	0.2	0.2
America total	2.4	2.2	2.4	2.1
Japan	0.8	0.9	0.8	0.7
Israel	0.3	0.2	0.2	0.2
India	0.1	0.1	0.2	0.2
Other countries Asia	0.6	0.8	0.8	0.9
Asia total	1.8	2.0	2.0	2.0
Africa	0.3	0.3	0.3	0.3
Australia, Oceania	0.2	0.2	0.2	0.2
Other overseas countries	0.5	0.5	0.5	0.5
Total	34.2	30.8	33.6	32.0

1) Denmark, Finland, Norway, Sweden and Iceland (since 1.1.1994)
2) since 1.1.1999
Source: Federal Statistical Office

Grisons comes out top

For tourism purposes, Switzerland is divided into 12 regions some of which overlap with cantons (states) while others reach beyond cantonal borders, such as Central Switzerland (Lucerne, Uri, Schwyz, Obwalden, Nidwalden, Zug), Eastern Switzerland (Glarus, Schaffhausen, Appenzell Ausserrhoden and Innerrhoden, St. Gallen, Thurgau) as well as the Swiss Mittelland (Aargau, parts of Berne and Solothurn) and Basle-City/Basle-Country (the two cantons of Basle plus part of Solothurn), the later two since 1998.

Regions	Supply		Overnight stays 2002 in millions			Occupancy in % of available...	
	Available rooms	Available beds	Swiss	Foreigners	Total	rooms	beds
Grisons	16939	32389	2.8	2.7	5.5	49.7	46.2
Central Switzerland	13236	24609	1.3	1.8	3.1	41.1	34.5
Valais	13246	25973	1.9	2.2	4.1	45.9	43.1
Zurich	10986	20734	1.4	1.9	3.3	45.7	43.1
Bernese Oberland	11852	19990	1.0	2.3	3.3	59.2	45.9
Ticino	9550	18430	1.3	1.2	2.5	43.1	37.8
Vaud	9386	17447	1.0	1.6	2.6	49.9	39.5
Eastern Switzerland	9242	16697	1.1	0.6	1.7	36.3	28.2
Swiss Mittelland	9039	15622	1.2	0.8	2.0	46.6	35.7
Geneva	7714	12346	0.4	1.9	2.3	64.7	51.3
Fribourg-Neuchâtel-Jura	4306	8267	0.5	0.2	0.7	32.4	24.7
Basle-City/Basle-Country	3721	5977	0.3	0.5	0.8	49.2	37.8
Switzerland	119217	218481	14.2	17.7	31.9	47.4	40.1

Source: Federal Statistical Office

Mountain resorts account for the lion's share of hotel overnight stays

To highlight the importance of tourism in the various areas of Switzerland, statistics provide separate figures for *mountain resorts* (places higher than 1000 metres above sea level, with some exceptions like the Upper Toggenburg), *lakeside zones* (places beside lakes, except Geneva, Lausanne and Zurich) and *large cities* (Basle, Berne, Geneva, Lausanne, Zurich). The remaining areas are referred to as *other areas*.

Available hotel beds in tourist areas								
Year	Mountain resorts	Lakeside zones	Large cities	Other areas	Percent of total			
					Mountain resorts	Lakeside zones	Large cities	Other areas
1992	79400	46400	31100	65800	36	21	14	29
1997	77700	46000	30100	65700	35	21	14	30
2001	76900	45200	31900	66200	35	21	14	30
2002	75100	45400	31700	66200	34	21	15	30

Source: Federal Statistical Office

Hotel overnight stays in tourist areas								
Year	Mountain resorts in millions	Lakeside zones in millions	Large cities in millions	Other areas in millions	Percent of total			
					Mountain resorts	Lakeside zones	Large cities	Other areas
1992	14.0	7.2	5.3	7.7	41	21	15	23
1997	11.9	6.7	5.2	6.9	39	22	17	22
2001	13.0	7.0	6.0	7.6	39	21	18	23
2002	12.1	6.7	5.8	7.4	38	21	18	23

Source: Federal Statistical Office

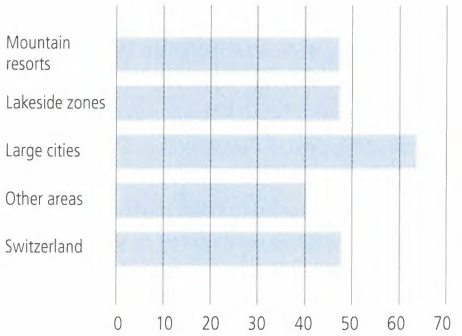
2002: Shares of domestic and foreign overnight stays in hotels vary according to the areas



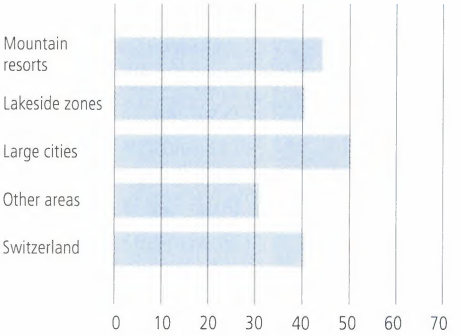
Source: Federal Statistical Office

2002: Highest occupancy in large cities

Occupancy in percent of available rooms



Occupancy in percent of available beds



Source: Federal Statistical Office

Large cities have the highest bed occupancy

Bed occupancy in tourist areas in percent

Year	Mountain resorts		Lakeside zones		Large cities		Other areas	
	existing beds[1)]	available beds[1)]	existing beds[1)]	available beds[1)]	existing beds[1)]	available beds[1)]	existing beds[1)]	available beds[1)]
1992	36	48	37	42	46	47	30	32
1997	31	42	34	40	47	48	27	29
2001	34	46	36	42	51	52	29	32
2002	32	44	35	40	49	50	29	31

1) Tourism statistics distinguish between existing and available hotel beds. «Existing beds» means the total of all hotel beds in Switzerland. Some hotels (e.g. in winter sports resorts) operate on a seasonal basis. The hotel beds actually available are reported as «available hotel beds».
Source: Federal Statistical Office

More overnight stays in summer than in winter



Source: Federal Statistical Office

Accommodation: Supplementary accommodation

Supplementary accommodation includes vacation apartments (chalets, private rooms, etc., excluding beds in second homes which are not sublet to third parties as well as overnight stays by owners or permanent tenants), camping sites, group accommodation (dormitories for tourists, Swiss Alpine Club huts and shelters), as well as youth hostels.

While the tourism statistics of camping sites, group accommodation and youth hostels are based on censuses conducted nationwide, the figures for vacation apartments refer to the Cantons of Berne, Obwalden, Grisons, Ticino and Valais as well as to a selection of places in the Cantons of Appenzell Ausserrhoden, St. Gallen and Glarus. These statistics thus probably cover at least three-quarters of overnight stays in this type of accommodation in Switzerland. In order to obtain the total figure for all overnight stays in supplementary accommodation establishments, statistics have to be estimated.

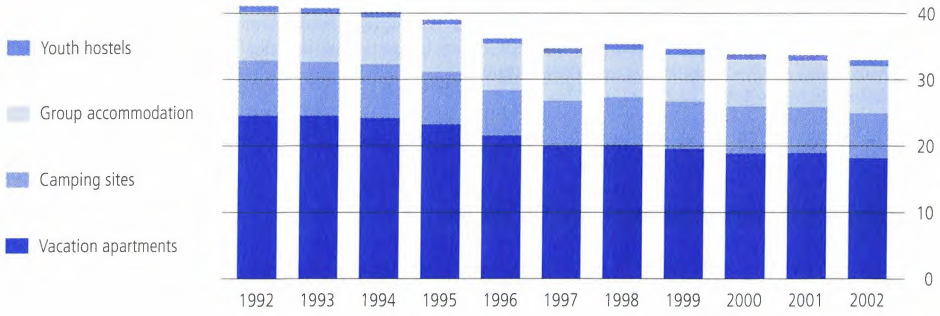
Beds/lodgings in supplementary accommodation

Types of accommodation	1992		1997		2001		2002	
	Units	in %	Units	in %	Units	in %	Units	in %
Vacation apartments	360 000 [1]	42	360 000 [1]	45	360 000 [1]	45	360 000 [1]	45
Camping sites	261 700	31	207 900	26	210 000	26	207 400	26
Group accommodation	224 300	26	226 100	28	229 000	28	233 200	28
Youth hostels	8000	1	6900	1	6200	1	6600	1
Total	854 000	100	800 900	100	805 200	100	807 200	100

1) As per 1986 survey

Source: Federal Statistical Office

Vacation apartments account for approximately 55% of all overnight stays in supplementary accommodation establishments
(in millions)



Source: Federal Statistical Office

The majority of guests in supplementary accommodation are Swiss

Overnight stays in all types of supplementary accommodation (in millions)[1]				
Country of residence	1991/92	1996/97	2000/01	2001/02
Switzerland	24.7	21.6	21.0	21.2
Total of foreign countries	16.4	13.0	12.6	11.7
Germany	8.9	7.6	6.8	6.3
United Kingdom	0.7	0.5	0.6	0.6
France	0.9	0.7	0.6	0.6
Italy	0.6	0.4	0.4	0.4
Belgium	1.2	0.9	0.8	0.8
Netherlands	2.5	1.8	1.9	1.7
Nordic countries[2]	0.2	0.1	0.2	0.2
Spain	0.2	0.1	0.1	0.1
Austria	0.2	0.1	0.1	0.1
Russia, Federation[3]	...	...	0.0	0.0
Other countries Europe	0.4	0.3	0.5	0.3
Europe total (excl. Switzerland)	15.8	12.5	12.0	11.1
United States	0.2	0.2	0.3	0.2
Canada	0.0	0.0	0.0	0.0
Brazil	0.0	0.0	0.0	0.0
Other countries America	0.1	0.1	0.0	0.1
America total	0.3	0.3	0.3	0.3
Japan	0.0	0.0	0.0	0.0
Israel	0.1	0.1	0.1	0.1
India	0.0	0.0	0.0	0.0
Other countries Asia	0.1	0.1	0.1	0.1
Asia total	0.2	0.2	0.2	0.2
Africa	0.0	0.0	0.0	0.0
Australia, Oceania	0.1	0.1	0.1	0.1
Other overseas countries	0.1	0.1	0.1	0.1
Total	41.1	34.6	33.6	32.9

1) November–October
2) Denmark, Finland, Norway, Sweden and Iceland (since 1.1.1994)
3) Since 1.1.1999
Source: Federal Statistical Office

Mainly Swiss and Germans in all types of supplementary accommodation

Country of residence	Overnight stays by type of supplementary accommodation 2001/02[1]				
	Vacation apartments	Camping sites	Group accommod.	Youth hostels	Total
Switzerland	10410000	5165010	5167023	497490	21239523
Total of foreign countries	7707001	1642881	1941642	371324	11662848
Germany	4620973	684529	874008	127296	6306806
Netherlands	1084200	515293	79559	11258	1690310
Belgium	461723	36142	250936	6531	755332
France	366541	68106	152233	18681	605561
United Kingdom	332561	92871	130022	20211	575665
Italy	255958	86632	68355	14782	425727
United States	85709	7209	101286	24261	218465
Austria	44011	18977	22384	6491	91863
Spain	42886	30301	15303	12801	101291
Australia/Oceania	10939	7601	31030	12659	62229
Luxembourg	37197	2901	13735	1091	54924
Other foreign countries	364303	92319	202791	115262	774675
Total	18117001	6807891	7108665	868814	32902371

1) November–October

Source: Federal Statistical Office

More overnight stays in supplementary accommodation during the summer season



Source: Federal Statistical Office

Types of accommodation	Overnight stays in supplementary accommodation	
	Winter Nov. 2001–April 2002 in millions	Summer May–Oct. 2002 in millions
Vacation apartments	11.1	7.0
Camping sites	1.1	5.7
Group accommodation	3.1	4.0
Youth hostels	0.3	0.6
Total	15.6	17.3

Source: Federal Statistical Office

A major branch of the economy

The Swiss hotel and catering industry offers an extremely diverse range of services, provided by some 29100* hotel and catering establishments of the most varied character and orientation. From unspoilt village pubs, local and city restaurants, trendy restaurants with foreign cuisine, impressive country inns, simple and comfortable hotels to top restaurants and luxury establishments. Offers are continually being adapted to meet guests' requirements, an increasingly important factor in these extremely competitive times.

In addition to the enormous competitive pressure, the hotel and catering business has had to accept a considerable drop in turnover compared to the previous year. The annual turnover of the Swiss hotel and catering industry is estimated at 22 to 23 billion Swiss francs (catering trade: some 15 to 16 billion Swiss francs; hotel industry: some 6 to 7 billion Swiss francs).

As a key tourism industry, the hotel and catering businesses are one of the most important sectors of our economy. They are not only an interesting source of foreign currency earnings but also major clients for other branches such as agriculture, commerce, the construction industry, banks, local services and specialist trades and thus an important indirect employer.

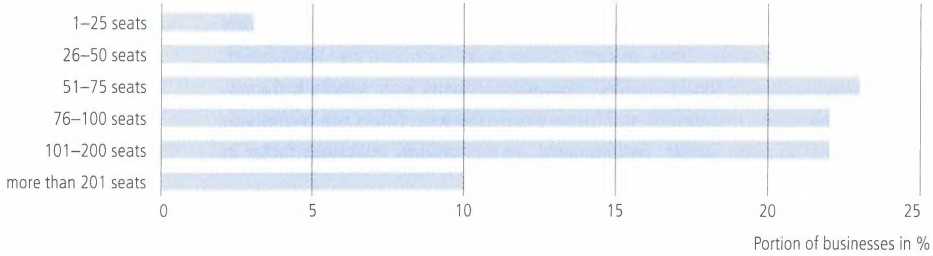
The hotel and catering industry provides around 221200 jobs with labour costs amounting to over 9 billion Swiss francs. The hotel and catering industry is also an attractive employer for apprentices. Although the industry is training fewer apprentices than last year, from 1993 to 2002 it has been possible to achieve a marked increase in the number of apprenticeship positions in comparison to other branches.

Further information:
GastroSuisse, Economic Department, phone +41(0)1 377 52 71.

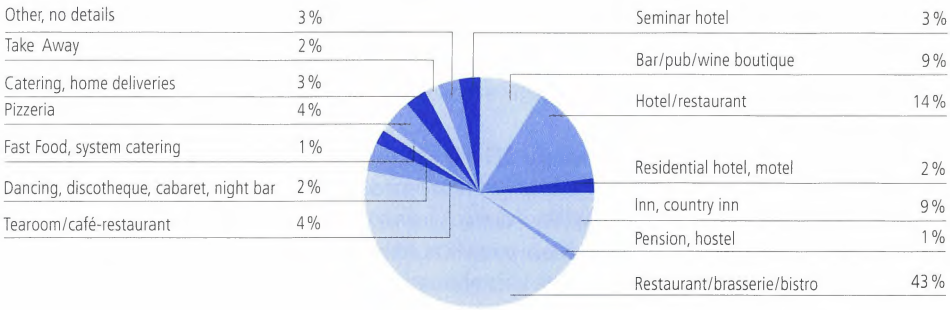
* Basis: Federal 2001 Establishment Census and extrapolation according to credit reform

Sources pages 23–27: Surveys conducted by Gastroconsult AG/GastroSuisse, Branch Situation 2003

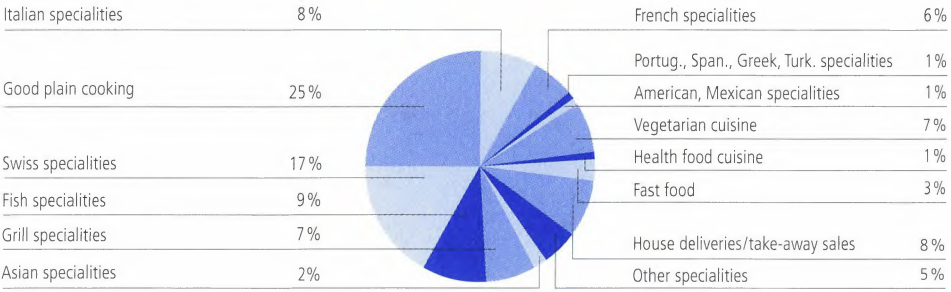
Business size: number of seats per restaurant



Business type: an extraordinarily wide range of hotel and restaurant services



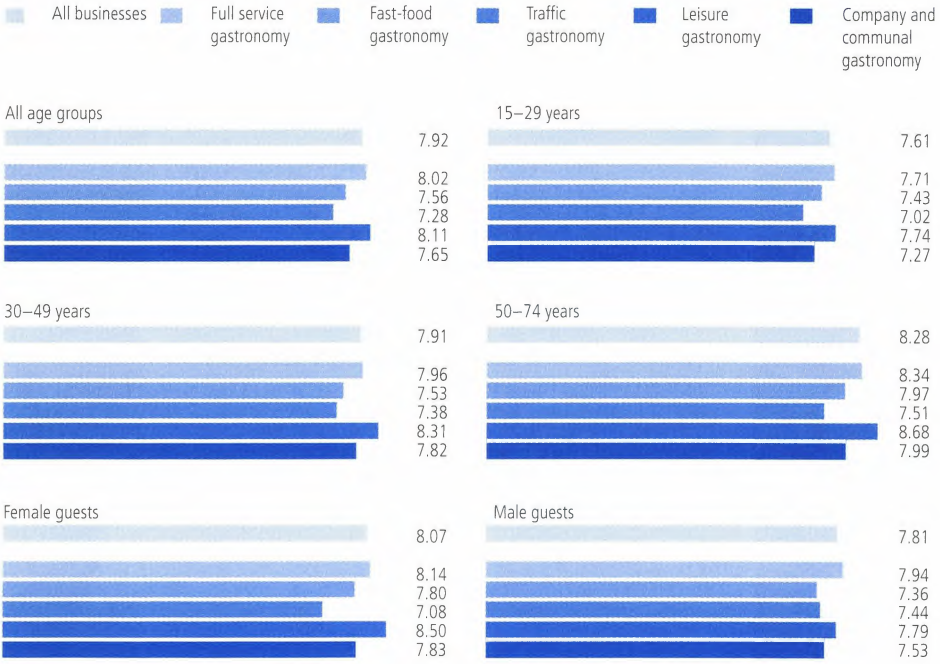
The offer of «good plain cooking» and Swiss specialities still most popular



Full service and leisure gastronomy come off best

Overall guest satisfaction, according to age and sex

(scale of 1 to 10, 1 = totally dissatisfied, 10 = very satisfied)



Copyright Marketingold AG

For the first time since the introduction of the study «Eating and Drinking Out» compiled by Marketingold AG in collaboration with GastroSuisse, guest satisfaction was investigated in addition to consumer behaviour. The catering establishments visited were rated by the consumers questioned on the basis of their consummation (food and drink).

Full service and leisure gastronomy were generally rated as good in this study. This is all the more pleasing as these sectors generate three quarters of customer spending. Fast food and traffic gastronomy, the two sectors to record the greatest fall in customer spending in 2002, came off significantly worse in the ratings than the remainder of the catering business.

Main tourism employers

Persons employed	4th quarter 2002	4th quarter 2001	Variation absolute	Variation %
Full-time employees (90% and over)	148400	152500	−4100	−2.7
Part-time employees (50–89%)	30700	31200	−500	−1.6
Part-time employees (< 50%)	42100	39900	+2200	+5.5
Total number of employees (overall)	221200	223600	−2400	−1.1

Although the number of persons employed showed a slight overall decrease of 1.1 percent from 223600 to 221200 in the 4th quarter of 2002 in comparison to the same quarter of the previous year, the Swiss hotel and catering industry still plays a very important role as a touristic employer.

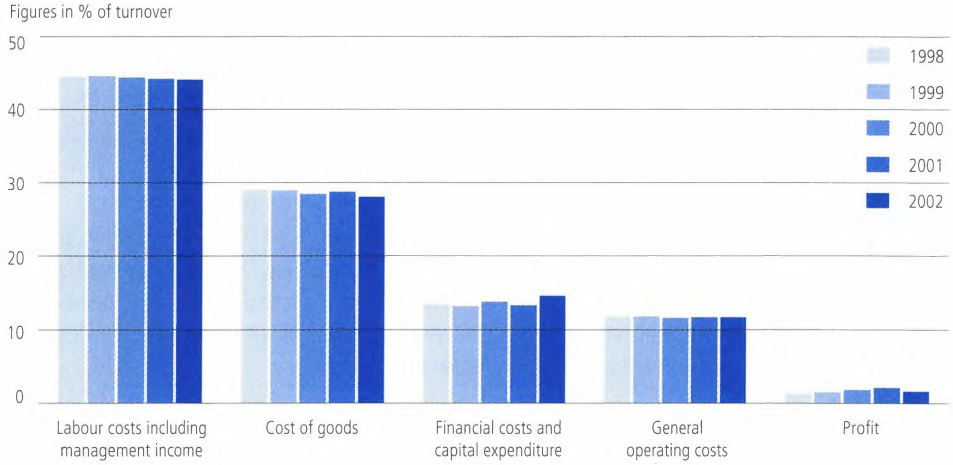
However, the employment reduction in the hotel and catering industry is significantly smaller than the corresponding drop in turnover. In this business it is often impossible to adjust deployment of personnel to turnover fluctuations at short notice.

The number of full-time jobs shows a relatively large decrease of 4100 units (–2.7%). The number of part-time employees with 50 to 89% of normal working hours has also dropped (–500 units or –1.6%). At the same time, the number of employees with a workload of less than 50% shows a relatively strong increase (+2200 units or +5.5%).

With this renewed, slightly higher supply of part-time jobs, the hotel and catering industry is meeting the widespread demand of a large sector of the population and thus confirming its role as a modern employer.

Labour costs: the lion's share of costs

Cost structure since 1998 (average of all restaurants participating in survey)



A five-year comparison shows that the staff-cost ratio has fallen slightly (–0.4%). It is not possible to read any change of trend into this. Labour costs continue to remain the major cost component. Two developments are amongst those contributing to the slightly lower staff-cost ratio. Various businesses have no longer replaced staff who have left because of falling turnover and the generally negative economic situation. In addition it has been shown that various businesses have lowered the amount of management earnings. Labour costs for paid employees have therefore decreased very little or not at all.

Following last year's increase, the cost of goods ratio has again fallen slightly in the year under review. Various businesses could no longer avoid making long-delayed price adjustments. Added to this, the growth rate of other cost elements was even greater. On average, the cost of goods ratio currently amounts to less than one third of the selling price. Many guests are insufficiently aware of this fact and so often unjustly criticise pricing, mistakenly seeing the difference between the selling price and cost of goods as the caterer's «earnings». The far more significant impact of labour costs is underestimated.

A wide variety of means of transportation

More than half of all travel activities for vacation and buisness purposes with at least one overnight stay, made by Swiss residents within Switzerland or abroad, occur by private car. About one fifth of the tourists travel by train, 18% travel by plane, and 4% go by bus, postbus, tram or metro.

Public transport

One of the densest railway networks in the world

- The Swiss railway network is approximately 5240 kilometres long:
  - standard gauge: 3854 km, 3000 km of which are used by the Swiss Federal Railways
  - narrow gauge: 1386 km, 97 km of which are cog-wheel tracks
- The Swiss Federal Railways run some 5000 passenger trains covering approximately 288 000 kilometers daily, half of which are train kilometres operated by long-distance services (Eurocity, Intercity and express trains) the other half regional and suburban services. In 2002, 320 million passengers used Swiss Federal Railways; 44 kilometers per person per day on the average.

The Postal Coach as distributor

- 17 postal coach regional centres are partners for transport services provided on order as well as suppliers of information to individual travellers.
- 771 postal bus routes operate over a total route network of some 10 316 km (that is some three times the length of the Swiss Federal Railways network).
- 2232 postal coach drivers transported 97 million passengers in 1958 coaches (75 874 seats), thereby covering 87 million km in total. 1958 postal buses travel a distance equal on average to five times round the Earth.

Over 29 million air travellers

- At the three intercontinental airports of Zurich, Geneva and Basle, 468 890 take-offs and landings with approx. 29.2 million passengers were registered in 2002, some 89% of whom used regular scheduled airlines.
- Approximately 35% of visitors to Switzerland arrive by plane.
- 58.2% of passengers at Swiss airports travel on Swiss airlines.
- In 2002, the Swiss airline companies network comprised 126 destinations in 59 countries on 4 continents.

Bustling navigation on Swiss lakes

Year	Licensed boats on Swiss lakes and rivers	Hereof steamers	Number of seats	Passengers (millions)
1985	163	12	62648	9.43
1990	167	12	63758	10.00
1995	159	13	67013	9.98
1996	157	13	65483	9.48
1997	155	13	65273	10.04

Source: Federal Statistical Office

Increasing supply and demand for tourism transport facilities

- There are 1792 tourism transport facilities in Switzerland: 12 cog-wheel trains, 58 funiculars, 216 aerial cableways, 120 gondola lifts, 314 chair-lifts, as well as 1072 skilifts. On a total network of approx. 1950 km, they cover an altitude difference of some 600 km.
- Some 370 railway enterprises work year round and 15 in summer only. During the winter season, tourism transport facilities can transport some 1.45 million passengers per hour up mountains.
- Without mountain railways, cableways, etc., skiing in its modern form would be unthinkable. These facilities function directly as employers and indirectly as an incentive for tourist development and as support for winter tourism, making a decisive contribution to stabilizing the population in mountain areas and supporting the political and cultural identity of mountain communities.
- Tourism transport businesses employ more than 11000 people.
- Another 10000 jobs in ski schools and mountain restaurants are directly dependent on the existence of such transport facilities.

Passengers in 1997				
	Summer millions	Winter millions	Total millions	%
Cog-wheel trains	8.8	8.7	17.5	5.4
Funiculars	9.0	9.5	18.5	5.7
Aerial cable cars	18.1	140.0	158.1	48.3
Skilifts		133.0	133.0	40.6
Total	35.9 (11%)	291.2 (89%)	327.1	100.0

Sources: Federal Statistical Office/Swiss Cableways (skilifts)

Proceeds from passenger traffic 1997				
	Summer millions	Winter millions	Total millions	%
Cog-wheel trains	...	...	113.8	14
Funiculars	...	...	53.7	7
Aerial cable cars Skilifts [1]	111.3	528.0	639.3	79
Total	...	...	806.8	100

1) Only skilifts which belong to a licensed Swiss aerial cable car company.
Source: Federal Statistical Office

Private transport

- The Swiss road network covers 71277 km, 1856 km of which are national highways, 18224 km cantonal highways and 51197 km local roads.
- In 1997, 193033 foreign buses entered Switzerland, transporting approx. 6.3 million passengers, 10% of them in transit.
- During the whole of 1996, some 202 million persons entered Switzerland by road. This means a daily average of 551985 persons in 314112 cars.

Germans top the list

Motor vehicles entering Switzerland from abroad (in thousands)			
	Cars (holiday traffic)		
	1991	1996 [1]	2001 [2]
Germany	17410	18809	19445
France	11282	14299	15772
Italy	17611	11874	12130
Austria	3291	3578	3558
Other foreign countries	2926	1926	2480
Total	52520	50486	53385

1) New surveying method since 1995
2) Since 2001 motorcycles are no longer included in the survey.
However, in recent years the share of motorcycles remained stable at 2.5%.
Source: Federal Statistical Office

Swiss Ski Schools

3000 to 4000 licensed ski instructors and back-up instructors are employed by the 200 Swiss Ski Schools. During high season, however, some 7500 persons work as instructors. Besides regular adult and child instruction, most ski schools offer courses in snowboarding, telemark skiing, cross-country skiing as well as other sports and all-inclusive packages on request. In the past few years, there has been a shift from class to private tuition.

Half-day lessons[1] in Swiss Ski Schools

	1999/00	2000/01	2001/02
Berne	224182	234262	249330
Grisons	731789	754742	686722
Eastern Switzerland	101055	90564	93221
Vaud	185886	188216	157308
Valais	673432	687657	649402
Western Switzerland	38564	23090	18778
Central Switzerland	126185	126462	113744
Ticino	21577	24965	8812
Total	2102670	2129958	1977317

1) A half-day lesson corresponds to two hours
Source: Swiss Ski and Snowboard School Association

Cycleland Switzerland 2002

Outstanding results for Cycleland Switzerland: In 2002 cyclists rode approx. 170 million kilometres on the Cycleland Switzerland route network. Over 250000 travellers en route for several days generated over 600000 overnight stays. Services and goods worth a total of CHF 240 million were consumed; travellers en route for several days spent approx. CHF 405 per trip with an average of 2.4 overnight stays and day excursionists CHF approx. 15 per day.

The hotel – still the number one for overnight stay accommodation

Number of overnight stays of cycle tourists

Hotel	Camping	Youth hostel	Sleeping in hay	Bed & breakfast	Private	Total
330000	120000	30000	20000	30000	50000	580000

Source: Cycling in Switzerland

Quality label for the Swiss tourism industry

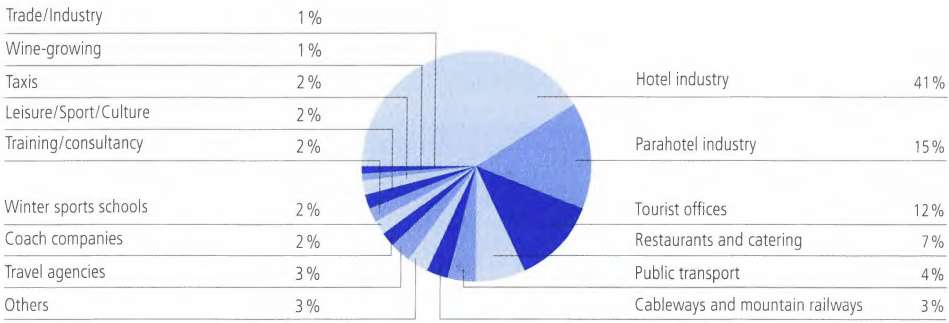
With the «Quality label for the Swiss tourism industry» programme, the sponsoring organisations of Switzerland Tourism and many tourist businesses have committed themselves to the clear definition of quality standards for their services in the interest of guests.

Level I aims for high service quality.

Level II includes the service and management quality. It will be awarded to businesses that are assessed mystery shoppers.

Level III will be awarded to those businesses which have drawn up and implemented a comprehensive quality management system (QMS) that is recognised internationally.

Distribution of the label among sectors of the industry



Establishments and firms wishing to obtain a quality label should appoint a Quality Representative who is trained as a Quality-Coach (level I) or a Quality-Trainer (level II). The quality label is only awarded to establishments and companies with trained Coaches or Trainers. More than 4000 Quality Representatives have been trained in Switzerland up to now.

	1998	1999	2000	2001	2002	1.6.2003	Total
Labels awarded							
Level I	175	258	186	345	398	152	1514
Level II	74	33	27	48	51	21	254
Level III	–	–	–	–	–	29	29
Quality Representatives							
Q-Coaches	1273	669	495	674	669	180	3960
Q-Trainers	–	–	227	154	179	47	607

Swiss tourism in the international context

Volume and revenue shares of international tourism

In 2001, 692.6 million tourists arrivals were reported worldwide, generating revenues to the tune of EURO 517.6 billion.

Region	Arrivals 2001[1]		Income 2001	
	in millions	in %	in billion EUR	in %
1. Europe	399.7	57.7	257.2	49.7
2. America	120.8	17.4	136.8	26.4
3. East Asia/Pacific	115.2	16.6	91.8	17.7
4. Africa	28.5	4.1	18.8	3.6
5. Middle East/South Asia	28.4	4.1	13.1	2.5
Total	692.6	100.0	517.6	100.0

1) Estimations

Source: World Tourism Organization (WTO, May 2003)

Switzerland's share of worldwide revenue from international tourism is approx. 1.6% in 2001.

GDP share of international tourism in 2001 (OECD members)

1. Hungary	8.4%	7. New Zealand	4.4%
2. Spain	5.8%	8. Iceland	4.0%
3. Czech Republic	5.8%	9. Ireland	3.7%
4. Austria	5.3%	10. Slovakia	3.2%
5. Portugal	5.1%	**11. Switzerland**	**3.2%**
6. Turkey	4.4%	12. Belgium	3.0%

Source: IMF (GDP) – WTO (receipts) – May 2003

Volume and revenue share worldwide

In 2001, the position of Swiss tourism compared with other countries in regard to arrivals and revenue was as follows:

	Arrivals 2001			Revenue 2001		
Destination	in millions	in %	rank	in billion EUR	in %	rank
France	76.5	11.0	1.	33.5	6.5	3.
Spain	49.9	7.1	2.	36.7	7.1	2.
United States	45.5	6.6	3.	80.7	15.6	1.
Italy	39.1	5.6	4.	28.8	5.6	4.
China	33.2	4.8	5.	19.9	3.8	5.
United Kingdom	22.8	3.3	6.	18.2	3.5	7.
Mexico	19.8	2.9	7.	9.4	1.8	11.
Canada	19.7	2.8	8.	12.0	2.3	8.
Austria	18.2	2.6	9.	11.3	2.2	9.
Germany	17.9	2.6	10.	19.2	3.7	6.
Hungary	15.3	2.2	11.	4.4	0.9	16.
Poland	15.0	2.2	12.	5.4	1.0	15.
Hong Kong	13.7	2.0	13.	9.2	1.8	12.
Malaysia	12.8	1.8	14.	–	–	17.
Portugal	12.2	1.8	15.	6.1	1.2	14.
Turkey	10.8	1.6	16.	10.0	1.9	10.
Switzerland	**10.7**	**1.5**	**17.**	**8.5**	**1.6**	**13.**
Other foreign countries	259.9	37.5		204.3	39.5	
Total	692.6	100.0		517.6	100.0	

Source: IMF (GDP) – WTO (receipts) – May 2003

International Tourism Organizations

- **European Travel Commission ETC**, 61, Rue du Marché aux Herbes, B-1000 Brussels, Belgium, phone 0032 2 504 03 03, fax 0032 2 514 18 43, www.etc-europe-travel.org, etc@planetinternet.be.
- **HOTREC**, 111, Boulevard Ansprach, Box 4, B-1000 Brüssel, Belgien, phone 0032 2 513 63 23, fax 0032 2 502 41 73, www.hotrec.org, main@hotrec.org.
- **World Tourism Organization WTO**, Capitàn Haya 42, E-28020 Madrid, Spain, Phone 0034 915 678 100, fax 0034 915 713 733, www.world-tourism.org, omt@world-tourism.org.

Tourism Associations and Institutes

Tourism Interest Groups and Professional Associations

- **Association of the Swiss Navigation Companies**, Ebenaustrasse 10, 6048 Horw, phone +41 (0)41 340 44 74, fax +41 (0)41 340 68 74, www.vssu.ch. Established: 1898. Tasks: Promotion of navigation on Swiss rivers and lakes, safeguarding the interests of the 15 member shipping companies, collaboration with tourist organisations.
- **Automobile Club of Switzerland (ACS)**, Wasserwerkgasse 39, 3000 Berne 13, phone +41 (0)31 328 31 11, fax +41 (0)31 311 03 10, www.acs.ch, acszv@acs.ch. Established in 1898. Objectives: To safeguard the interests of motorists, legal counseling and support, emergency road service, tourist service.
- **Bed and Breakfast Switzerland**, Route des Liddes 12, 3960 Sierre, phone +41 (0)27 456 20 06, fax +41 (0)27 456 20 06, www.bnb.ch, cathy.renggli@bnb.ch. Established in 1999. Association of host families. Purpose: information, promotion, publication «B&B Switzerland» guide, quality standards.
- **Community of interest (directors) of the Higher Schools of Tourism Management Switzerland**, c/o IST AG, Josefstrasse 59, 8005 Zürich, phone +41 (0)1 440 30 90, fax +41 (0)1 271 71 17. Founded: 2001. Tasks: Safeguarding common interests towards the public authorities, associations and general public, promotion of tourism management education and training in Switzerland. The following schools are members: Ecole Suisse de Tourisme, Sierre (www.est-stf.ch), Höhere Fachschule für Tourismus Graubünden (www.academia-engiadina.ch), Höhere Fachschule für Tourismus, Luzern (www.hsw.fhz.ch), Internationale Schule für Touristik AG, Zürich (www.ist-zurich.ch), Scuola superiore alberghiera e del turismo, Bellinzona (www.ssat.ch)
- **Cycling in Switzerland**, Office: STF, P.O.Box 8275, 3001 Berne, phone +41 (0)31 307 47 40, fax +41 (0)31 307 47 48, www.cycling-in-switzerland.ch, www.humanpoweredmobility.ch, info@veloland.ch. Established in 1995. Tasks: Quality assurance, information (route guide and route map), development of national and regional cycling-routes and SlowUp (regional car-free adventure days), offers for combined mobility for leisure, tourism and everyday use.
- **GastroSuisse**, Blumenfeldstrasse 20, P.O.Box, 8046 Zurich, phone +41 (0)1 377 55 90, fax +41 (0)1 371 89 09, www.gastrosuisse.ch, info@gastrosuisse.ch. Established: 1891. GastroSuisse is the leading national association for the hotel and catering industry. Over 20000 members (hotels, pensions, guest-houses, restaurants, cafés, etc.) belong to the largest employers' association in the hotel and catering industry. GastroSuisse is the nation-wide active information and service organisation for its members. Basic and advanced training in the hotel and catering trade.

- **hotelleriesuisse**, Monbijoustrasse 130, P.O.Box, 3001 Berne, phone +41 (0)31 370 41 11, fax +41 (0)31 370 44 44, www.swisshotels.ch, shv@swisshotels.ch. Established in 1882. National association of the leading and classified hotels in Switzerland. Some 2600 members with 175000 beds (75% of all overnight stays). Support for members in entrepreneurial and professional matters, representation of interests, shaping and influencing the political and economic environment of the hotel trade, basic and advanced training, consultation, marketing, business management and technical management planning.
- **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.GastroLine.ch, info@hotelgastrounion.ch. Established in 1886. Objective: Union of employees, professionals and management staff of the hotel/restaurant trade. Basic and advanced training of hotel and catering staff and management. Commitment to attractive, secure employment in Swiss tourism.
- **Public Transport Association**, Dählhölzliweg 12, 3000 Berne 6, phone +41 (0)31 359 23 23, fax +41 (0)31 359 23 10, www.voev.ch, info@voev.ch. Established in 1889. Objectives: To safeguard the interests of members, to encourage cooperation among members, information and consultation services, training of professionals.
- **Safety in adventures**, Münsterplatz 3, 3011 Berne, Office: SQS, Luigi Arigoni, Ruchenbergstrasse 23, 7000 Chur, phone +41 (0)81 356 00 21, fax +41 (0)81 356 00 22, www.safetyinadventures.ch, luigi.arigoni@sqs.ch. Established in 2002. The foundation «Safety in Adventure» supports the cause of safety for adventure and outdoor activities offered on a commercial basis in Switzerland. Certification procedure on the basis of a safety concept; certified undertakings are awarded a safety label.
- **Swiss Association for Transport and Environment (ATE)**, P.O.Box, 3360 Herzogenbuchsee, phone +41 (0)62 956 56 56, fax +41 (0)62 956 56 57, www.verkehrsclub.ch, service@verkehrsclub.ch. Established in 1979. Objectives: Promotion of a people- and nature-conscious tourism. To safeguard the interests of users of all kinds of transportation.
- **Swiss Association of Official Tourist Office Managers**, P.O.Box 175, 8041 Zurich, phone +41 (0)1 481 04 69, fax +41 (0)1 481 04 72, www.vstd-asdt.ch, info@vstd-asdt.ch. Established in 1928. Objectives: To promote the professional interests of tourist office managers, vocational training and advanced training of tourist office personnel, special meetings of regional tourist office managers.
- **Swiss Association of coffeehouse-holders (SCV)**, Bleicherweg 54, 8039 Zurich, phone +41 (0)1 201 67 77, fax +41 (01) 201 68 77, www.cafetier.ch,

cafetier@swissonline.ch. Established in 1938. Objectives: Representation of the professional interests of café owners and support of the members with comprehensive services.

- **Swiss Cableways**, Dählhölzliweg 12, 3000 Berne 6, phone +41 (0)31 359 23 33, fax +41 (0)31 359 23 10, www.seilbahnen.org, info@seilbahnen.org. Established in 1970. Objectives: To safeguard the interests of the members, information and consultation services, common policies on tariffs and standardized tickets, vocational training and advanced training for personnel at all levels.
- **swisscamps**, Swiss Camping Association, Bahnhofstrasse 2, 3322 Schönbühl, phone +41 (0)31 852 06 26, fax +41 (0)31 852 06 27, www.swisscamps.ch, info@swisscamps.ch. Established in 1975. Objectives: Promotion of camping vacations and classification of camp sites.
- **SWISS CITIES**, c/o Switzerland Tourism, Tödistrasse 7, 8027 Zurich, phone +41 (0)1 288 13 16, fax +41 (0)1 288 12 07, www.swiss-cities.com, catherine.touaibi@switzerland.com. Group of 28 Swiss Cities promoting urban tourism on the practical and the political levels. Marketing activities in close cooperation with Switzerland Tourism.
- **Swiss Federal Railways (SBB)**, Hochschulstrasse 6, 3000 Berne 65, phone +41 (0)51 220 11 11, www.sbb.ch, web.railinfo@sbb.ch. The Swiss Federal Railways are a limited company (special law), owned by the state, and at the same time Switzerland's biggest service company in the public transport sector.
- **Swiss Federation of Travel Agencies (SFTA)**, Etzelstrasse 42, P.O.Box, 8038 Zurich, phone +41 (0)1 487 30 50, fax +41 (0)1 480 09 45, www.srv.ch, mail@srv.ch. Established in 1928. Objectives: Association of qualified travel agencies in Switzerland to develop professional skills, protect the interests of the profession, professional assistance to SFTA members.
- **Swiss holiday farms**, 8595 Altnau, phone +41 (0)71 695 23 72, fax +41 (0)71 695 23 67, www.bauernhof-ferien.ch, r.barth@tele-net.ch. Established in 1988. Purpose: Support of the members, information and consultation services, basic and advanced training of host families. Quality standards (seal of quality). Central booking office at Swiss Travel Savings Fund.
- **Swiss Hotel Schools Association (ASEH)**, 1897 Le Bouveret, phone +41 (0)79 402 77 77, fax +41 (0)24 482 88 90, www.aseh.ch, info@aseh.ch. Association of Switzerland's leading hotel management schools. The Association welcomes hotel management schools located in Switzerland who meet and abide by the strict quality standards outlined in its bylaws.
- **Swiss Post**, Postbus, Helvetiastrasse 17, 3030 Berne, phone +41 (0)31 338 49 57, fax +41 (0)31 338 05 70, www.postauto.ch, postauto@post.ch. Leading

provider of regional public road services for passenger transportation. 17 regional postbus centers.

- **SWISS SNOWSPORTS**, Hühnerhubelstrasse 95, P.O.Box 182, 3123 Belp, phone +41 (0)31 810 41 11, fax +41 (0)31 810 41 12, www.snowsports.ch, info@snowsports.ch. Founded in 1934. Objectives: Alliance of tourism sector institutions interested in joint promotion of the Swiss Ski School system. Promotion of interests and education of ski, snowboard, telemark and cross-country teachers.

- **Swiss Spa**, Av. des Bains 22, 1400 Yverdon-les-Bains, phone +41 (0)24 420 15 21, fax +41 (0)24 423 02 52, www.heilbad.org, info@heilbad.org. Established in 1924. Objectives: To safeguard the interests of thermal spas, optimum evaluation of thermal springs in the interests of public health, standardized classification of health establishments, close cooperation with the medical profession.

- **Swiss Tourism Federation (STF)**, Finkenhubelweg 11, P.O.Box 8275, 3001 Berne, phone +41 (0)31 307 47 47, fax +41 (0)31 307 47 48, www.swisstourfed.ch, stv@swisstourfed.ch. Established in 1932. Objectives: 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)**, Neuengasse 15, 3001 Berne, phone +41 (0)31 329 66 33, fax +41 (0)31 329 66 01, www.reka.ch, info@reka.ch. Established in 1939. Objectives: The promotion of social and family tourism, vacation financing by issuing Reka cheques, running of REKA vacation centres, vacation apartment rentals.

- **Swiss Travel Association of Retailers (STAR)**, Badenerstrasse 808, 8048 Zürich, phone +41 (0)1 439 60 66, fax +41 (0)1 439 60 67, www.star.ch, star@star.ch. Established: 1995. Association of independent travel retailers with the following objectives: representation of interests inside and outside the trade, promotion of quality in the travel business by information, training and other measures. Establishment of a franchise chain and supply of software and other services via various associate companies.

- **Swiss Youth Hostels (SYH)**, Schaffhauserstrasse 14, P.O.Box, 8042 Zurich, phone +41 (0)1 360 14 14, fax +41 (0)1 360 14 60, www.youthhostel.ch, bookingoffice@youthhostel.ch. Established in 1924. Objectives: Promotion of youth travel, accommodation for young travellers, youth groups, schools, families, etc.

- **Switzerland Convention & Incentive Bureau (SCIB)**, Tödistrasse 7, P.O.Box 572, 8027 Zurich, phone +41 (0)1 288 12 71, fax +41 (0)1 201 53 01, www.MySwitzerland.com, scib@switzerland.com. Established in 1964. Objectives: Promotion of congress tourism member resorts, common promotional efforts.

- **Switzerland Destination Management Ltd**. Headquarters: Tödistrasse 51, P.O.Box, 8027 Zurich, phone +41 (0)1 205 93 93, fax +41 (0)1 205 93 99, www.sdm.ch, mail@sdm.ch. Information and booking: 00800 100 200 30. Foundation 1997. Purpose: information and booking center for tourism offers in Switzerland. Housing, travel agent products, event management.
- **TOUREX**, Association of Swiss Tourism Experts, 3780 Gstaad, phone +41 (0)33 744 07 45, fax +41 (0)33 744 07 42, www.tourex.ch, info@tourex.ch. TOUREX comprises more than 130 members active on management level in all branches in the Swiss tourism and travel industry. Its goals are a strong public presence in all matters of tourism and travel policies in Switzerland as well as courses and seminars for its members, thanks to a professional platform active in the consulting and coaching areas. The diploma of a Swiss Tourism Expert is the highest post-graduate title in the Swiss tourism & travel industry.
- **Touring Club of Switzerland (TCS)**, ch. de Blandonnet 4, 1214 Vernier, phone +41 (0)22 417 27 27, fax +41 (0)22 417 20 20, www.tcs.ch. Established in 1896. Objectives: To safeguard the interests of the motorist, legal counseling and support, emergency road service, tourist service.
- **Wellbeing Switzerland**, Office of Swiss Health Hotels, Oberdorfstrasse 53b, 9100 Herisau, phone +41 (0)71 350 14 14, fax +41 (0)71 350 14 18, www.wohlbefinden.com, info@wohlbefinden.com. Established in 1992. Representing the interests of health hotels, rehabilitation and convalescent homes on health-policy issues; information as to range and availability of health treatment in Switzerland.

Public corporations

- **Swiss Association for Hotel Credit (SGH)**, Gartenstrasse 25, P.O.Box, 8039 Zurich, phone +41 (0)1 209 16 16, fax +41 (0)1 209 16 17, www.sgh.ch, www.hotelanalyser.ch, info@sgh.ch. Established in 1967. Assignment: Preferential treatment of hotel investments (construction, renewal, purchase) through granting of loans and consulting services.
- **Switzerland Tourism (ST)**, Tödistrasse 7, 8027 Zurich, phone +41 (0)1 288 11 11, fax +41 (0)1 288 12 05, www.MySwitzerland.com, info@switzerland.com. Established in 1917. Offices in 25 countries. Objectives: to increase the demand for Switzerland as a travel, holiday- and congress destination.

Federal institutes

- **Federal Government Commission for Tourism**, Secretariat, Belpstrasse 18, 3003 Berne, phone +41 (0)31 322 27 58. Established in 1973. Objectives: This Commission coordinates tourism policy within the Federal administration.

- **State Secretariat for Economic Affairs**, Tourism, Belpstrasse 18, 3003 Berne, phone +41 (0)31 322 27 58, fax +41 (0)31 322 27 49, www.seco-admin.ch. Established in 1935. Objectives: Central Federal authority for tourism, secretariat of the Federal Government Commission for Tourism.
- **Swiss Federal Statistical Office**, Tourism Division, Bümplizstrasse 45, 3027 Berne, phone +41 (0)31 323 66 13, fax +41 (0)31 323 68 58, www.statistik.admin.ch, info-tour@bfs.admin.ch. Established in 1860. Objectives: To provide statistics on Swiss tourism (surveys on infrastructure, arrivals and overnight stays in hotels and supplementary accommodation, tourism balance of payments, reports on special subjects).
- **Swiss Federal Transport Office**, Bollwerk 27, 3003 Berne, phone +41 (0)31 322 57 11, fax +41 (0)31 322 58 11, www.bav.admin.ch, webmaster@bav.admin.ch. Established in 1873. Objectives: Within the tourism framework, the Federal Transport Office is responsible for issuing aerial cablecar licences.

Institutes of higher education

- **Institute for public services and tourism at the University of St. Gall**, Varnbüelstrasse 19, 9000 St. Gall, phone +41 (0)71 224 25 25, fax +41 (0)71 224 25 36, www.idt.unisg.ch, idthsg@unisg.ch. Established in 1941. Objectives: University lecturing, research, market research, consulting and expertising in the competence fields of tourism and transportation, regional economic and public management.
- **University of Berne, Research Institute for Leisure and Tourism (FIF)**, Engehaldenstrasse 4, 3012 Berne, phone +41 (0)31 631 37 11, fax +41 (0)31 631 34 15, www.fif.unibe.ch, fif@fif.unibe.ch. Established in 1941. Objectives: Research into tourism-related issues, lectures on tourism at Berne University, experts in the leisure and tourism sectors.
- **Unité d'enseignement et de recherche en tourisme (UERT)** à l'Ecole des HEC des l'Université de Lausanne, BFSH 1, 1015 Lausanne-Dorigny, phone +41 (0)21 692 34 87, fax +41 (0)21 692 33 05, www.hec.unil.ch/uert, vincent.matthey@hec.unil.ch. Established in 1992. Consolidation course «Tourism» for a first degree. A management course for the holders of diplomas from hotel and tourism vocational colleges. Basic research, expert opinion activity.