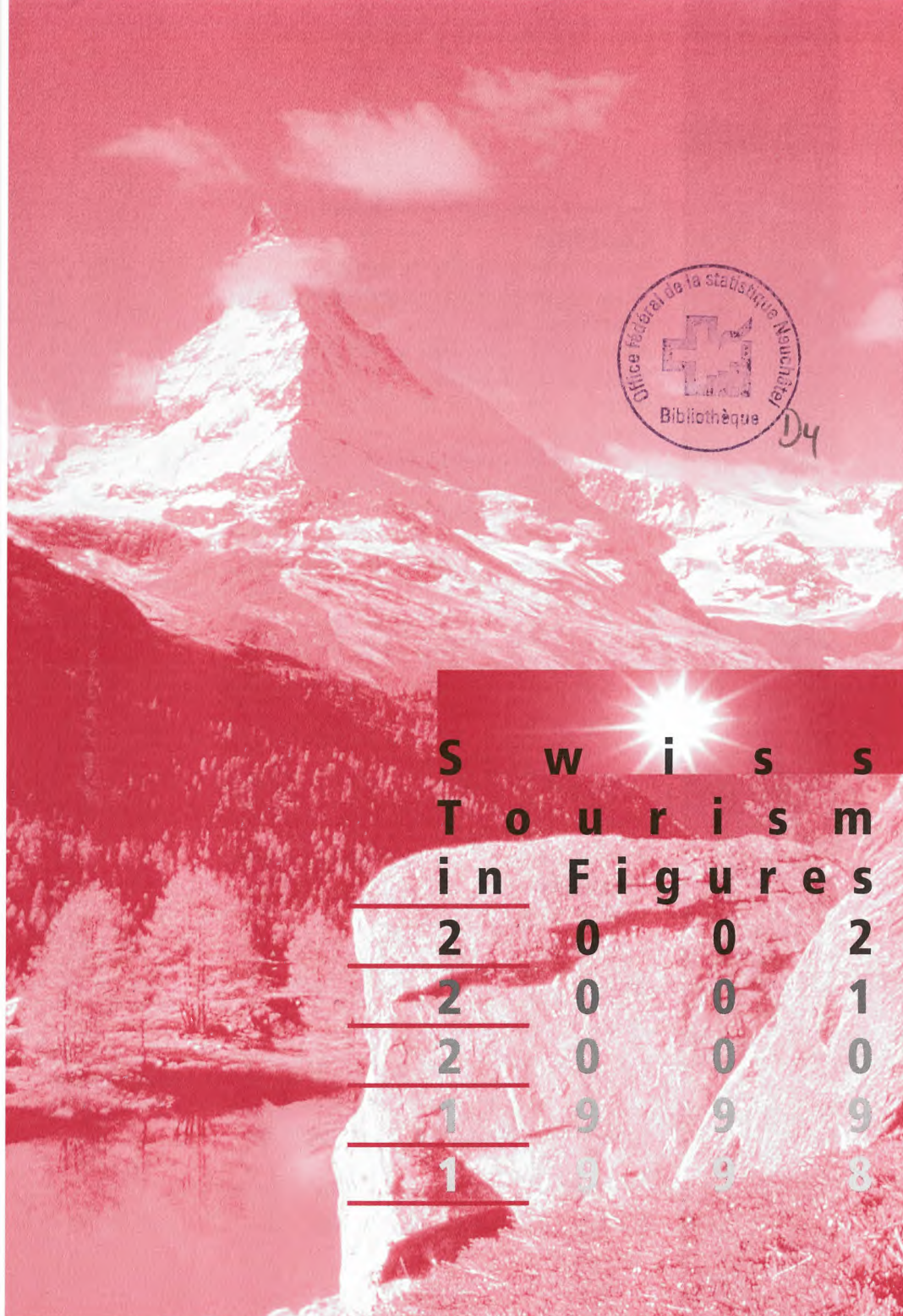


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Tourism Associations and Institutes 35

Edited by

- Federal Statistical Office (FSO)
- GastroSuisse
- Swiss Hotel Association (SHA)
- Swiss Tourism Federation (STF)
- Switzerland Tourism (ST)

The data in this publication are based on 2001 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**.

Photograph: Switzerland Tourism (at Grindjisee, above Zermatt)

Berne, July 2002/Ordering number: 359-0200

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 22.4 billion Swiss francs in 2001, 9.7 billion (or 43%) came from domestic tourism. Expenditure by foreign visitors in Switzerland added some 12.7 billion Swiss francs (3% of the Gross Domestic Product).

Total tourism revenue	1990	1995	2000	2001
		in billion Swiss francs		
From domestic tourists	7.4	9.1	9.7	9.7
From foreign tourists	10.3	11.2	13.1	12.7
Total	17.7	20.3	22.8	22.4
Tourism's share of Swiss Gross Domestic Product	5.6%	5.6%	5.6%	5.4%

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

Export revenue by industry[1)]	1990	1995	2000	2001
		in billion Swiss francs		
1. Metal and machine industry	37.7	40.8	56.0	54.9
2. Chemical industry	18.4	24.0	36.0	41.8
3. Tourism (Tourism balance of payments)	*10.3*	*11.2*	*13.1*	*12.7*
4. Watchmaking industry	6.8	7.7	10.3	10.6
5. Textile industry	4.9	4.0	3.9	3.9

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		
	1995	2000	2001	1995	2000	2001	1995	2000	2001
Business & vacation stays	6.7	7.4	7.1	7.3[1)]	9.2[1)]	9.2[1)]	0.7[1)]	-0.2[1)]	-0.5[1)]
Educational & medical stays	1.3	1.6	1.6						
Excursionists, transit visitors	1.9	2.8	2.6	0.9	1.1	1.1	1.0	1.7	1.5
Other tourism	0.5	0.4	0.4	0.5	0.4	0.4	0.0	0.0	0.0
Consumption expenditure of border-zone inhabitants	0.8	0.9	1.0	0.0	0.0	0.0	0.8	0.9	1.0
Total	11.2	13.1	12.7	8.7	10.7	10.7	2.5	2.4	2.0

1) Incl. educational and medical stays
Source: Federal Statistical Office

Hotel guests from abroad spend some 6.0 billion francs

Expenditure by foreign visitors staying overnight in tourist accommodation establishments totalled 7.1 billion francs in 2001, of which four fifths were spent by tourists staying in hotels.

Overnight tourists Year 2001	Expenditure in millions of francs for:			
	lodging	meals	incidentals	total
in hotels	2814.8	1358.5	1812.7	5986.0
in vacation apartments	202.3	236.6	230.2	669.1
at camp grounds	22.7	45.6	43.8	112.1
in group accommodation	37.9	49.1	42.9	129.9
in youth hostels	9.8	9.5	4.3	23.6
with friends and relatives	*	*	*	182.2
Total	*	*	*	7032.3

Source: Federal Statistical Office

Average expenditure of a foreign tourist per overnight stay

Overnight tourists Year 2001	Expenditures in francs for:			
	lodging	meals	incidentals	total
in hotels	144	70	93	307
in vacation apartments	24	28	28	80
at camp grounds	13	25	24	62
in group accommodation	19	25	21	65
in youth hostels	26	25	11	62
with friends and relatives	*	*	*	32

Source: Federal Statistical Office

Foreign guests in Switzerland spend money not only in hotels and restaurants, but also in other businesses. In 2001, for instance, they spent the following estimated amounts on:

Gasoline/Petrol	689 million Swiss francs
Tobacco	206 million Swiss francs
Sweets	329 million Swiss francs
Inland water transportation	22 million Swiss francs
Crafts, souvenirs and postcards	105 million Swiss francs
Taxi fares	83 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 creates employment

The tourism industry is a major employer. Almost every twelfth person in Switzerland's work force is directly or indirectly employed in tourism, and this proportion is substantially higher in mountain regions than in urban areas.

Employment in tourism in Switzerland (full-time job equivalents)

Direct employment in tourism[1]	
Hospitality industry (hotels, restaurants), passenger transport (railways and mountain railways, roads, boats and aviation) Retail trade, entertainment, culture and sport, health, education, banks, insurances	175 000–190 000
Indirect employment in tourism[1]	
Intermediate consumption (goods and services obtained from others, in particular expenditure on goods and equipment, rent, transport and energy costs, maintainance and repair costs, advertising costs etc.), **investments, revenue**	80 000–90 000
Total employment in tourism	*255 000–280 000*
Percentage of overall employment	*8.1%–8.9%*

1) Employment directly related to tourism

Source: Swiss Federal Tourism Promotion; Improvement of structure and quality of services, seco, Berne 2002

Accommodation establishments and the catering trade: the main tourism employers

As to the jobs in tourism in a narrow sense the hotel and restaurant trade plays an important role. In order to fill all job vacancies in accommodation establishments and restaurants, Switzerland depends on foreign labour. The following information is based on figures from the Federal Aliens Office and the Federal Statistical Office.

Employed Persons (annual average)

Year	Swiss	Foreigners				Total
		Permanent residents & foreigners with annual permit	Seasonal workers	Foreign border-zone workers	Foreigners total	
Accommodation establishments and restaurants						
2000	130705	82464	12060	10771	105295	236000
2001	128005[1)]	83325	13046	11624	107995	236000
Construction industry						
2000	210492	72155	5454	10899	88508	299000
2001	208214[1)]	71882	7020	11884	90786	299000

1) Provisional data

Sources: Federal Aliens Office and Federal Statistical Office

Slightly less jobs in the catering trade

The number of employees in the catering trade has dropped by 0.2 per cent compared with the same quarter in the previous year, i.e. from 224000 to 223600. The number of full-time jobs has decreased by 1500, at the same time the number of part-time staff has risen by 1000.

Employees (in thousand)

	Full-time employees[1)]			Part-time employees[2)]			Total employees		
	2000	2001		2000	2001		2000	2001	
1st quarter	155.6	156.9	+ 0.8%	70.3	68.3	– 2.8%	225.9	225.2	– 0.3%
2nd quarter	162.2	153.3	– 5.5%	70.3	71.1	+ 1.1%	232.5	224.4	– 3.5%
3rd quarter	157.0	153.1	– 2.5%	66.5	71.3	+ 7.2%	224.1	224.5	+ 0.2%
4th quarter	154.0	152.5	– 1.0%	70.1	71.1	+ 1.4%	224.0	223.6	– 0.2%

1) 90% and over

2) less than 90%

Source: Federal Statistical Office

Accommodation: Hotels and supplementary accommodation

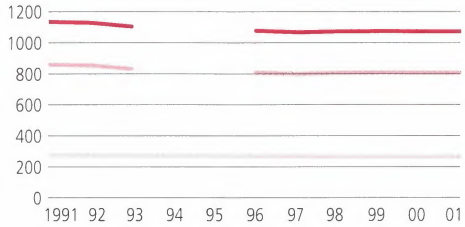
Overview of the accommodation sector

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

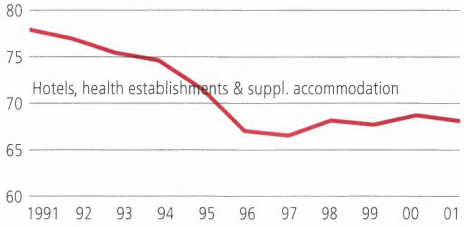
Hotel accommodation	= hotels, boarding houses, aparthotels, inns/ guesthouses, motels
Health establishments	= sanatoria, clinics, spas, convalescent homes, with medical or similar care
Supplementary accommodation	= chalets and apartments, private rooms, camping sites, group accommodation, youth hostels.

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.

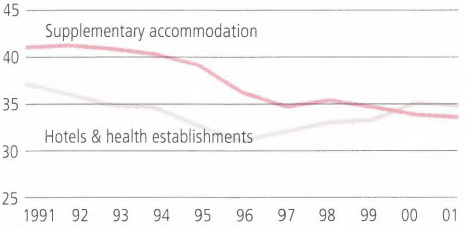
Beds (in thousands)



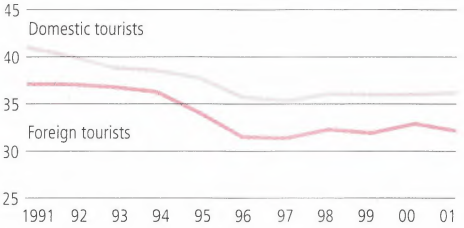
Total overnight stays (in millions)



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	1994[2]	1996[2]	2000	2001	Winter[1] 1999/00	Summer[1] 2000	Winter[1] 2000/01	Summer[1] 2001
Switzerland	38.5	35.7	35.9	36.1	16.0	19.9	16.3	19.8
Total of foreign countries	36.2	31.4	32.8	32.1	14.6	18.0	15.2	17.1
Germany	...	...	13.5	13.3	6.8	6.7	7.0	6.3
United Kingdom	...	...	2.5	2.6	1.1	1.3	1.3	1.3
France	...	...	1.9	1.9	1.0	0.9	1.0	0.9
Italy	...	...	1.4	1.4	0.6	0.8	0.6	0.8
Belgium	...	...	1.6	1.6	0.8	0.8	0.8	0.8
Netherlands	...	...	2.8	2.8	1.2	1.6	1.2	1.6
Nordic countries[3]	...	...	0.6	0.6	0.3	0.3	0.3	0.3
Russia, Federation[4]	...	...	0.2	0.2	0.1	0.1	0.1	0.1
Spain	...	...	0.4	0.4	0.1	0.3	0.2	0.3
Austria	...	...	0.5	0.4	0.2	0.3	0.2	0.2
Other countries Europe	...	...	1.4	1.3	0.7	0.7	0.6	0.7
Europe total (excl. Switzerland)	...	...	26.8	26.5	12.9	13.8	13.3	13.3
United States	...	...	2.4	2.1	0.7	1.7	0.8	1.4
Canada	...	...	0.2	0.2	0.1	0.1	0.1	0.1
Brazil	...	...	0.1	0.1	0.0	0.1	0.0	0.1
Other countries America	...	...	0.3	0.3	0.1	0.1	0.1	0.2
America total	...	...	3.0	2.7	0.9	2.0	1.0	1.8
Japan	...	...	1.0	0.9	0.2	0.8	0.2	0.7
Israel	...	...	0.3	0.3	0.1	0.2	0.1	0.2
India	...	...	0.2	0.2	0.0	0.1	0.0	0.2
Other countries Asia	...	...	0.9	0.9	0.3	0.7	0.4	0.6
Asia total	...	...	2.4	2.3	0.6	1.8	0.7	1.7
Africa	...	...	0.3	0.3	0.1	0.2	0.1	0.2
Australia, Oceania	...	...	0.3	0.3	0.1	0.2	0.1	0.2
Other overseas countries	...	...	0.6	0.6	0.2	0.4	0.2	0.4
Total	74.7	67.1	68.8	68.2	30.6	37.9	31.4	36.9

1) Winter: November–April; Summer: May–October
2) 1994: Estimation; winter season 1995/96: estimation; summer season 1996: survey
3) Denmark, Finland, Norway, Sweden and since 1.1.1994 Iceland
4) 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 211000 hotel beds in Switzerland, and by 2001 this figure had risen to 260100. 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 are confined to hotel accommodation.

5700 hotels with 260100 beds

Year	Number of hotels	Number of beds	
		existing[1)]	available[1)]
1991	6500	267400	220600
1996	6000	262400	220500
2000	5800	259700	219400
2001	5700	260100	220100

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

2001				
Size of establishment	Number of establishments			
	in figures	cumulated	in %	cumulated
up to 20 beds	2198	2198	38.6	38.6
21–50 beds	1999	4197	35.1	73.7
51–100 beds	971	5168	17.0	90.7
more than 100 beds	532	5700	9.3	100.0
up to 10 rooms	2157	2157	37.8	37.8
11–20 rooms	1441	3598	25.3	63.1
21–50 rooms	1467	5065	25.7	88.8
51–100 rooms	480	5545	8.4	97.2
more than 100 rooms	157	5702	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		
1991	114700	28000	3000	145700
1996	120200	21000	2300	143500
2000	122300	17100	2200	141600
2001	123100	16500	2200	141800

Source: Federal Statistical Office

In 13% of all hotels, an overnight stay costs less than Sfr. 50.–

Rate per person/night in Sfr.	Number of rooms			
	1991	1996	2000	2001
up to 49.99	33700	16300	18300	18400
50.– to 99.99	61300	55300	52300	51500
100.– to 149.99		37100	36300	36000
150.– and more	47400	34900	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	1730338	1285179	3015517
50.– to 99.99	5514002	5036355	10550357
100.– to 149.99	3964351	5899640	9863991
150.– and more	3104037	7052001	10156038

Source: Federal Statistical Office

Allocation of turnover and operating expenses in percent (2000)

Hotel category	*****	****	***	** + *
Total turnover	100.0	100.0	100.0	100.0
Expenditure on goods (incl. services)	13.5	18.9	21.8	25.1
Gross profit I	86.5	81.1	78.2	74.9
Personnel expenses	36.9	36.8	35.5	31.9
Gross profit II	49.6	44.3	42.7	43.0
Operating expenses	14.7	13.3	12.7	11.8
Operating result I	34.9	31.0	30.0	31.2
Management expenses	3.6	4.4	5.8	7.3
Operating result II	31.3	26.6	24.2	23.9
Maintenance	5.5	5.2	4.0	3.5
Gross operating profit	25.8	21.4	20.2	20.4
Financial and investment expenses	3.3	8.0	8.8	9.2
Operating cash flow	22.5	13.4	11.4	11.2
Non-recurring earnings and expenses	+1.2	+1.5	+1.1	+1.4
Operating cash flow	23.7	14.9	12.5	12.6
Depreciation	11.6	9.1	8.0	8.4
Operating result	12.1	5.8	4.5	4.2

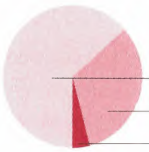
The Swiss Association for Hotel Credit (SGH) publishes reliable annual average figures on 451 establishments in Switzerland. The figures published on this page are based on these surveys and show average values. There are, of course, considerable differences between seasonal and year-round establishments and between mountain and lakeside hotels. Although the number of overnight stays and the operating results have increased in the past four years, the earnings situation remains tight. Further details are available on request from the SGH.

Source pages 12–14: Swiss Association for Hotel Credit (Statistical Year 2000)

Important key figures according to hotel categories

Hotel category	*****	****	***	** + *
Average number of beds (per hotel)	219	101	59	45
Bed occupation on days when open (in %)	56.7	58.3	49.0	42.1
Average accommodation rate (in CHF)	234.50	104.75	77.05	48.05
Accommodation earnings per bed (in CHF)	37165	18072	11101	5939
Indebtedness per bed (in CHF)	91861	79221	55148	41738

Shares of turnover according to hotel categories



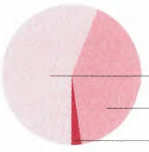
* and **

Food & beverage	63.3%
Accommodation	32.6%
Miscellaneous	4.0%



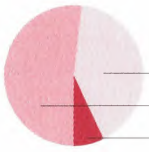
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Food & beverage	48.8%
Accommodation	47.7%
Turnover share miscellaneous	3.5%



***

Food & beverage	56.0%
Accommodation	41.7%
Miscellaneous	2.3%



*****

Food & beverage	41.1%
Accommodation	51.8%
Miscellaneous	7.1%

Hotel-Panel

Meaning and purpose of the Hotel Panel

The Hotel Panel is an annually recurring, joint project of the Swiss Association for Hotel Credit (SGH), the Federal Statistical Office (BFS) and the Swiss Hotel Association (SHV). For the third time already, the Federal Statistical Office (BFS) has made a random survey of 200 establishments from among all Swiss hotels which provide statistically representative results and allow well-based statements for the Swiss hotel trade as a whole. These hotel-specific structure key figures are also included in the creation of value statistics within the framework of the national accounts.

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

Comments on the Hotel Panel figures for 1999

According to the extrapolated Hotel Panel data for 1999, the Swiss hotel industry had a total turnover of some CHF 8.40 billion, of which CHF 3.4 billion or some 41 percent are attributable to just overnight accommodation. Taking Switzerland as a whole, the Swiss hotel industry incurs wage costs totalling some CHF 3.47 billion. The hotel industry is an intensively service-oriented branch: the average staff expenses amount to 36.3% of the total turnover[1]. The profit amounts to 6.3% of the revenue. The degree of immobilisation is considerable with fixed assets accounting for 83.2% of the total assets. As a result of the high intensity of fixed assets (around CHF 14.55 billion), enormous amounts have to be spent on depreciation, maintenance and finance. Only 12.9% (or some CHF 2.7 billion all told) of the invested capital are financed by own funds. This low equity capital ratio results partially from the losses carried forward from the previous year's accounts.

The average hotel has a turnover of CHF 81 per guest staying overnight (average accommodation rate without value-added tax and breakfast). The total turnover per employee in the hotel is some CHF 103900 annually (productivity). After deduction of the prior expenditure, the result is a gross product of CHF 60830. By comparison, an employee costs the business about CHF 43000.

1) This key figure often does not take the owner's salary into account (especially in the case of small and medium-sized hotels) and should therefore be a little higher.

Mean values by regions	City regions	Mountain regions	Lake regions	Other regions	Switzerland as a whole
Total turnover (in CHF 1000)	5090	1636	1947	1265	1726
Staff expenses (in CHF 1000)	2145	699	811	499	715
Key figures of the Profit & Loss Account					
Staff expenses (in %)	41.1	37.8	37.2	33.8	36.3
Operating result I (in %)	28.3	23.2	25.8	25.1	24.7
Cash Flow (in %)	14.4	14.3	12.8	14.3	14.0
Profit/Loss (in %)	5.1	4.9	4.9	8.2	6.3
Balance sheet key figures					
Fixed assets/Total assets (in %)	79.2	86.4	78.7	82.9	83.2
Equity capital/Total capital (in %)	22.2	17.3	11.8	8.2	6.3
Key figures per overnight stay					
Average accommodation rate (in CHF)	138	78	82	76	81
Key figures per employee					
Turnover per employee (in CHF)	119903	103236	105070	101786	103870
Staff expenses per employee (in CHF)	51580	43717	43976	40528	42897
Gross product per employee (in CHF)	75403	62976	59710	57519	60830

The majority of hotel guests are from abroad

Overnight stays by country of residence of guests (in millions)				
Country of residence	1991	1996	2000	2001
Switzerland	15.0	12.4	14.0	14.3
Total of foreign countries	20.4	17.3	19.9	19.3
Germany	7.0	6.0	6.4	6.3
United Kingdom	1.8	1.2	1.9	2.0
France	1.5	1.1	1.2	1.2
Italy	1.4	0.8	1.0	0.9
Belgium	0.9	0.9	0.8	0.7
Netherlands	0.9	0.8	0.9	0.9
Nordic countries [1]	0.5	0.4	0.3	0.4
Russia, Federation [2]	...	...	0.2	0.2
Spain	0.5	0.3	0.3	0.3
Austria	0.4	0.3	0.3	0.3
Other countries Europe	1.1	0.8	1.2	1.1
Europe total (excl. Switzerland)	16.0	12.6	14.5	14.3
United States	1.6	1.6	2.2	1.9
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	2.1	2.1	2.7	2.4
Japan	0.7	0.9	1.0	0.8
Israel	0.3	0.2	0.2	0.2
India	0.1	0.1	0.2	0.2
Other countries Asia	0.6	1.0	0.8	0.8
Asia total	1.7	2.2	2.2	2.0
Africa	0.4	0.2	0.3	0.3
Australia, Oceania	0.2	0.2	0.2	0.2
Other overseas countries	0.6	0.4	0.5	0.5
Total	35.3	29.7	33.9	33.6

1) Denmark, Finland, Norway, Sweden and since 1.1.1994 Iceland
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 2001 in millions			Occupancy in % of available ...	
	Available rooms	Available beds	Swiss	Foreigners	Total	rooms	beds
Grisons	17515	33339	2.9	3.1	6.0	52.8	49.4
Central Switzerland	13767	25519	1.3	2.0	3.3	42.6	36.2
Valais	13369	26150	1.9	2.3	4.2	46.8	44.2
Zurich	11572	19644	1.0	2.5	3.5	65.0	49.8
Bernese Oberland	11102	20915	1.4	2.1	3.5	47.7	45.0
Ticino	9482	18251	1.5	1.4	2.9	48.5	43.0
Vaud	9425	17567	0.9	1.6	2.5	48.7	38.7
Eastern Switzerland	9316	16719	1.1	0.7	1.8	37.7	29.4
Swiss Mittelland	9148	15745	1.2	0.9	2.1	46.8	35.4
Geneva	7763	12621	0.4	1.9	2.3	63.9	50.2
Fribourg-Neuchâtel-Jura	4204	8032	0.4	0.3	0.7	29.9	21.5
Basle-City/Basle-Country	3525	5639	0.3	0.5	0.8	53.2	41.3
Switzerland	120187	220143	14.3	19.3	33.6	49.3	41.8

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 touristic areas								
Year	Mountain resorts	Lakeside zones	Large cities	Other areas	As a percentage of the total			
					Mountain resorts	Lakeside zones	Large cities	Other areas
1991	77800	46100	32200	64500	35	21	15	29
1996	78700	46200	30100	65500	35	21	14	30
2000	76900	46000	31000	65600	35	21	14	30
2001	76900	45200	31900	66200	35	21	14	30

Source: Federal Statistical Office

Hotel overnight stays in touristic areas								
Year	Mountain resorts in millions	Lakeside zones in millions	Large cities in millions	Other areas in millions	As a percentage of the total			
					Mountain resorts	Lakeside zones	Large cities	Other areas
1991	13.8	7.6	5.9	8.0	39	21	17	23
1996	11.7	6.4	5.0	6.7	40	21	17	22
2000	13.0	7.4	6.0	7.6	38	22	18	22
2001	13.0	7.0	6.0	7.6	39	21	18	23

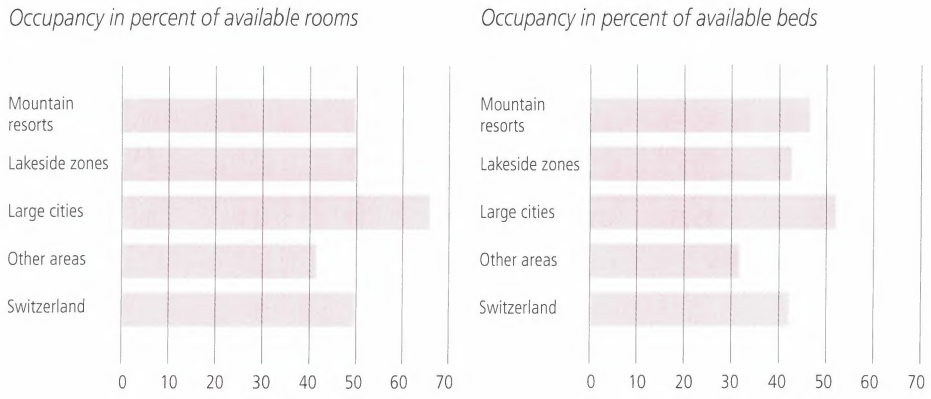
Source: Federal Statistical Office

2001: Shares of domestic and foreign overnight stays in hotels vary according to the areas



Source: Federal Statistical Office

2001: Best occupancy in large cities



Source: Federal Statistical Office

Large cities have the highest bed occupancy

Bed occupancy in touristic 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)]
1991	35	49	37	45	49	50	31	34
1996	30	41	32	38	45	46	26	28
2000	34	46	37	44	52	53	29	32
2001	34	46	36	42	51	52	29	32

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

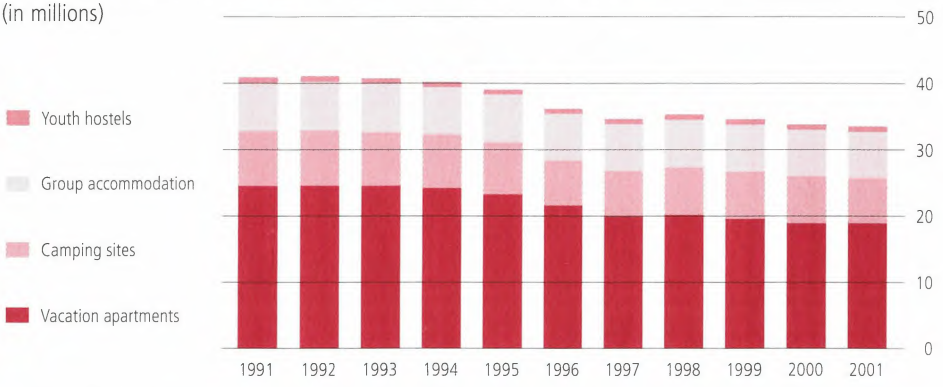
Types of accommodation	1990		1995		2000		2001	
	Units	in %	Units	in %	Units	in %	Units	in %
Vacation apartments	360 000[1)]	42	360 000[1)]	...	360 000[1)]	45	360 000[1)]	45
Camping sites	267 000	31	...	...	210 000	26	210 000	26
Group accommodation	229 000	27	...	...	230 000	29	229 000	29
Youth hostels	8100	1	...	...	6200	1	6200	1
Total	864 100	100	...	...	806 200	100	805 200	100

1) As per 1986 survey

Source: Federal Statistical Office

Vacation apartments account for approximately 56% 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	1990/91	1995/96[2]	1999/00	2000/01
Switzerland	24.6	22.3	21.1	20.9
Total of foreign countries	16.3	13.8	12.7	12.6
Germany	8.9	...	6.9	6.8
United Kingdom	0.7	...	0.6	0.6
France	0.9	...	0.7	0.6
Italy	0.6	...	0.4	0.4
Belgium	1.1	...	0.8	0.8
Netherlands	2.5	...	1.9	1.9
Nordic countries[3]	0.2	...	0.2	0.2
Spain	0.3	...	0.1	0.1
Austria	0.2	...	0.1	0.1
Russia, Federation[4]	...	...	0.0	0.0
Other countries Europe	0.3	...	0.4	0.4
Europe total (excl. Switzerland)	15.7	...	12.1	11.9
United States	0.2	...	0.2	0.3
Canada	0.1	...	0.0	0.0
Brazil	0.0	...	0.0	0.0
Other countries America	0.0	...	0.1	0.0
America total	0.3	...	0.3	0.3
Japan	0.0	...	0.0	0.0
Israel	0.1	...	0.1	0.1
India	0.0	...	0.0	0.0
Other countries Asia	0.1	...	0.1	0.1
Asia total	0.2	...	0.2	0.2
Africa	0.1	...	0.0	0.0
Australia, Oceania	0.1	...	0.1	0.1
Other overseas countries	0.2	...	0.1	0.1
Total	40.9	36.1	33.8	33.5

1) November–October
2) Winter season 1995/96: estimation; summer season 1996: survey
3) Denmark, Finland, Norway, Sweden and Iceland (since 1.1.1994)
4) 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 2000/01[1]				
	Vacation apartments	Camping sites	Group accommod.	Youth hostels	Total
Switzerland	10464999	5048322	4961664	469056	20944041
Total of foreign countries	8379015	1813549	1988140	378996	12559700
Germany	4996724	782949	891786	133100	6804559
Netherlands	1172458	595959	79726	11385	1859528
Belgium	501950	39084	260217	7029	808280
France	382685	67148	153569	15311	618713
United Kingdom	356230	73895	137646	18559	586330
Italy	259902	85899	63958	13420	423179
United States	103962	8752	110966	28946	252626
Austria	52753	21051	23513	5936	103253
Spain	46891	31374	12319	13117	103701
Australia/Oceania	10993	8298	34446	13907	67644
Luxembourg	40181	2834	14479	1086	58580
Other foreign countries	454286	96306	205515	117200	873307
Total	18844014	6861871	6949804	848052	33503741

1) November–October

Source: Federal Statistical Office

More overnight stays in supplementary accommodation during the summer season

Winter	47%	Summer	53%

Source: Federal Statistical Office

Types of accommodation	Overnight stays in supplementary accommodation	
	Winter Nov. 2000–April 2001 in millions	Summer May–Oct. 2001 in millions
Vacation apartments	11.5	7.3
Camping sites	0.9	6.0
Group accommodation	3.2	3.8
Youth hostels	0.3	0.6
Total	15.9	17.6

Source: Federal Statistical Office

The key industry in tourism

In Switzerland there is a wide and diversified range of hotel and catering services available. They are provided by some 30 200 hotel and catering businesses of the most varied character and orientation; from unspoiled village pubs to local and city restaurants, trendy restaurants with foreign and exotic cuisine, imposing country inns, simple and comfortable hotels to top restaurants and luxury hotels. There is one hotel or catering establishment to every 240 inhabitants (30 162 businesses to 7 204 055 inhabitants). The extremely great density of businesses leads to harsh competition within the branch, meaning an enormous challenge and an incentive to improve performance.

As a consequence of the great pressure of competition, the annual turnover fell in many businesses. Nevertheless, the total turnover made by the hotel and catering industry of an estimated 23 billion Swiss francs (catering trade: some 16 billion Swiss francs; hotel business some 7 billion Swiss francs) was maintained, compared with the previous year. This is attributable to the further increase in the number of hotel and catering businesses.

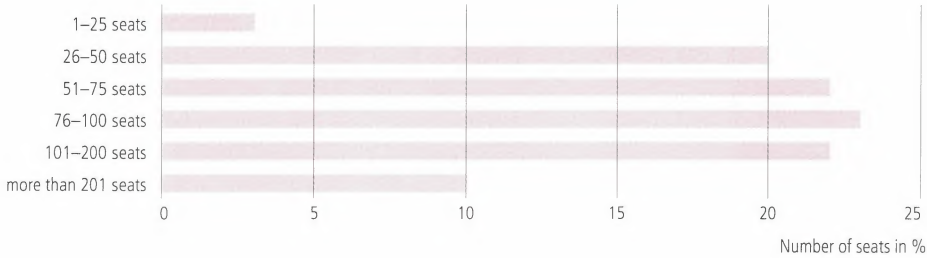
The hotel and catering businesses represent a key industry in tourism and have an important place in our economy. They are not only an interesting source of foreign currency earnings («invisible export»), but also a major buyer of domestic products (agriculture, commerce), an important client (construction industry, banks, local services, specialist trade) and thus additionally also an important indirect employer.

The hotel and catering industry provides some 224 000 jobs, with staff costs amounting to over 9 billion Swiss francs. The hotel trade and the catering industry are attractive employers for apprentices, too. In comparison with other branches it has been possible to markedly increase the number of apprenticeship positions in the hotel and catering trade since 1992.

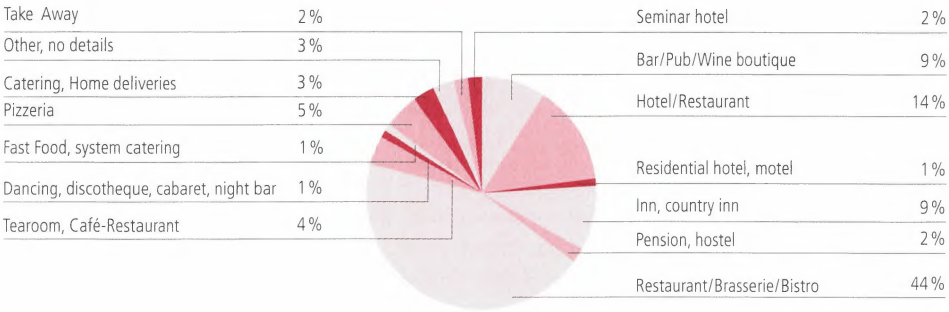
Further information:
GastroSuisse, Economic Department, Tel. +41 (0) 1 377 52 71

Sources pages 22–24: Surveys conducted by Gastroconsult/GastroSuisse, Branch Situation 2002

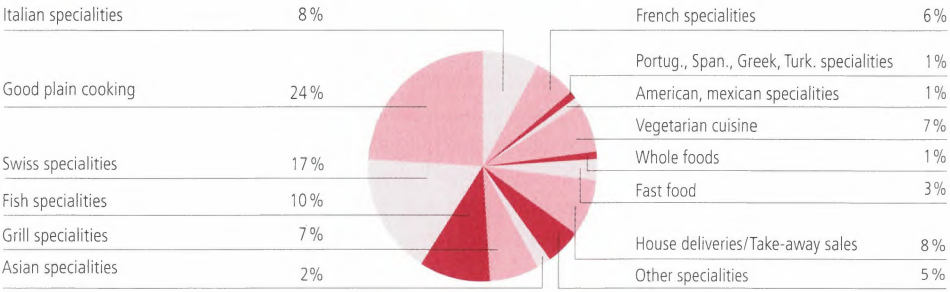
Business size: number of seats per restaurant



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

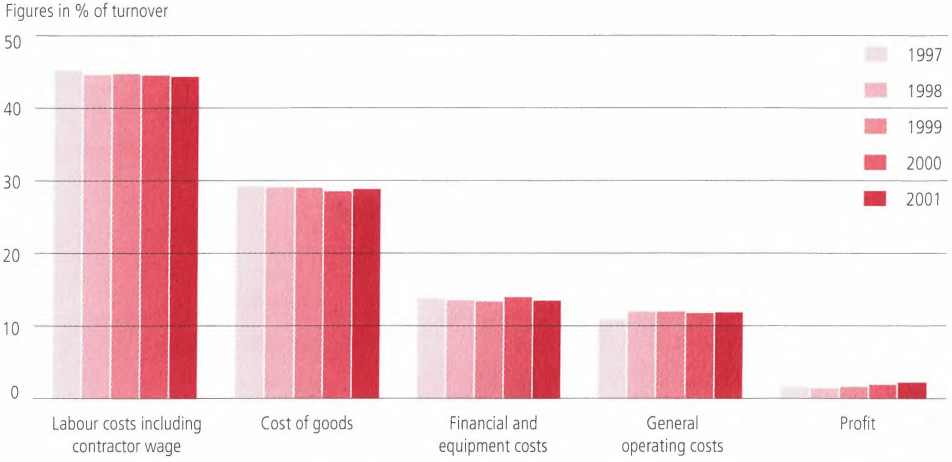


The offer of «good plain cooking» and Swiss specialities still most popular



Catering industry – slight rise in profit

The costs structure since 1997 (on average of all the restaurants participating in the survey)



In a 5-year comparison shows that the staff cost ratio has dropped slightly (–0.9 percent). It is not possible to read any change of trend into this – the differences are too small. Two developments have contributed to the slightly lower pro rata cost of staff: in the preceding years, various businesses were not able to reduce their staff in the short term, despite a decline in turnover. The slight recovery in turnover in 2000 and at the beginning of 2001 was therefore achieved without any additional employees. On the other hand various businesses have set the earnings of the management lower. The staff costs for the paid employees have in fact hardly fallen. This development is at the same time the explanation for the slight increase in profits.

The ratio of the costs of goods has risen slightly for the first time in many years (+0.3 percent). This slight rise is a consequence of the competitive situation in the hotel and catering business and the general economic situation. These two factors have often made price adjustments impossible. The ratio of the cost of goods still accounts for significantly less than one third of the selling price today. Many guests are aware of this. They therefore often criticise the pricing unjustly because they see the difference between the costs of goods and the selling price as the caterer's «earnings». The much more important staff costs are underestimated in their significance.

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 5100 kilometres long:
  – standard gauge: 3640 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 274000 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 2001, 304 million passengers used Swiss Federal Railways; 44 kilometers per person 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 10316 km (that is some three times the length of the Swiss Federal Railways network).
- 2171 postal coach drivers transported 94 million passengers in 1945 coaches (71000 seats), thereby covering 83 million km in total. 1945 postal buses travel a distance equal on average to five times round the Earth.

Over 28 million air travellers

- At the three intercontinental airports of Zurich, Geneva and Basle, 595850 take-offs and landings with approx. 31.9 million passengers were registered in 2001, some 90% of whom used regular scheduled airlines.
- Approximately 35% of visitors to Switzerland arrive by plane.
- 59.6% of passengers at Swiss airports travel on Swiss airlines.
- In 2001, the Swiss airline companies network comprised 482601 km and 176 destinations in 82 countries.

Bustling navigation on Swiss lakes

Year	Licensed boats on Swiss lakes and rivers	Here of 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.
Source: Federal Statistical Office

Private transport

- The Swiss road network covers 71 277 km, 1856 km of which are national highways, 18 224 km cantonal highways and 51 197 km local roads.
- In 1997, 193 033 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 551 985 persons in 314 112 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	15784
Italy	17611	11874	12111
Austria	3291	3578	3558
Other foreign countries	2926	1926	2480
Total	52520	50486	53378

1) New method of survey since 1995
2) Since 2001 motorcycles have not been 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

	1998/99	1999/00	2000/01
Berne	202035	224182	234262
Grisons	713660	731789	754742
Eastern Switzerland	93144	101055	90564
Vaud	182271	185886	188216
Valais	696866	673432	687657
Western Switzerland	36018	38564	23090
Central Switzerland	125729	126185	126462
Ticino	23125	21577	24965
Total	2072848	2102670	2129958

1) A half-day lesson corresponds to two hours

Source: Swiss Ski and Snowboard School Association

Cycleland Switzerland 2001

Outstanding results for Cycleland Switzerland: In 2001 some 4 million cyclists rode approx. 130 million kilometres on the Cycleland Switzerland route network. Over 200000 travellers en route for several days generated ca. 600000 overnight stays. Services and goods worth a total of CHF 170 million were consumed; travellers en route for several days spent CHF 440 per trip with an average of 3 overnight stays and day excursionists CHF 20 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

Results of the survey «Travel behaviour of the Swiss population 1998»

The Swiss Federal Statistical Office (SFSO) conducted a survey on travel behaviour in 1998. Another such survey will be carried out in 2003. The 1998 survey analyzed private and business travel by members of the Swiss population aged 15 and over to places outside their usual environment, with or without overnight stays, in Switzerland and abroad. A few characteristics of private excursions derived from this survey are presented here (private trips without overnight stays), as well as the average expenditure on each type of trip.

Private excursions: 90% of excursions by Swiss are confined to Switzerland. Their preferred means of transport to their chosen destination is their own car, or train. On arrival, they usually get around on foot, by train or bus. 55% of private excursions take place at weekends (32% on Sundays).

Means of transport – round trip



Source: Federal Statistical Office

Average expenditure

	By journey and person (CHF)			By night and person (CHF)		
Type of journey	Total	CH	Abroad	Total	CH	Abroad
Private excursions[1)]	78	68	175	...	...	...
Private journeys with overnight stays[1)]	719	316	1143	125	93	159
short journeys (1–3 overnight stays)	243	160	416	127	97	191
longer journeys (>3 overnight stays)	1271	694	1546	123	85	141
Business trips without overnight stay[2)]	104	79	332	...	...	...
Business trip with overnight stay[2)]	1074	368	1636	451	200	651

1) Expenditure on the all trip; 2) Employer's and private expenditure
Source: Federal Statistical Office

Findings from «Reisemarkt Schweiz»

Since 1970, the IDT-HSG Institute for Public Services and Tourism (christian.laesser@unisg.ch) has been conducting surveys on the travel behaviour of Switzerland's resident population at regular intervals.

Reisemarkt Schweiz 2001 analyses private travel by the resident population of Switzerland to destinations in Switzerland and abroad during 2001 (1.1.–31.12.). Private travel is regarded as all journeys undertaken by a person involving at least one night spent away from his/her place of residence and which were expressly mentioned by the interviewee as not being for business or professional reasons.

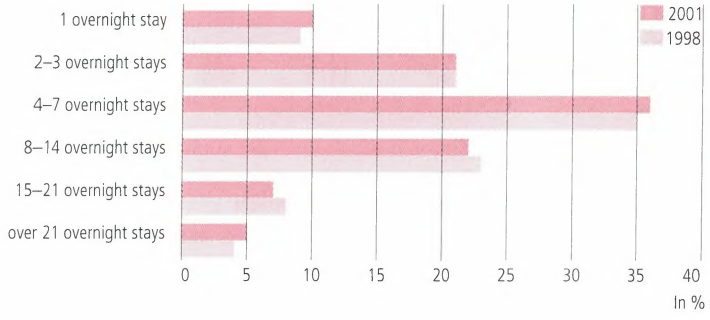
Key data on travel behaviour: The travel movements of the Swiss population appear to have stabilized at a high level. 77% participate in travel, with a good 70% of these undertaking 2.83 trips on average. Longer-term observation reveals that net travel intensity as regards trips with 3 and more overnight stays is stable at around 70%.

Key data for travel with at least 1 overnight stay

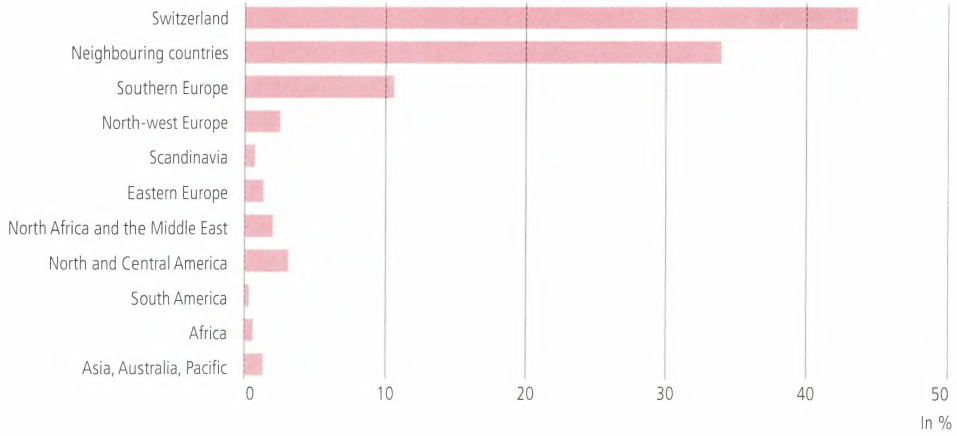
Indicators	1995/96	1998	2001
Net travel intensity (% of the population, at least one trip untertaken)	79%	84%	77%
Multiple travellers (with more than one trip of all travellers)	72%	70%	73%
Gross travel intensity in % (number of trips per 100 inhabitants)	225	232	218
Frequency of travel (number of trips per traveller)	2.85	2.77	2.83

Impact of 11 September 2002: Taken overall, the terrorist attacks in the USA had only a limited impact. North America as a travel destination lost small market shares (though the strong USD throughout the year may also be an explanatory factor) and travel periods – likewise for the year as a whole – have shifted towards the first half of the year.

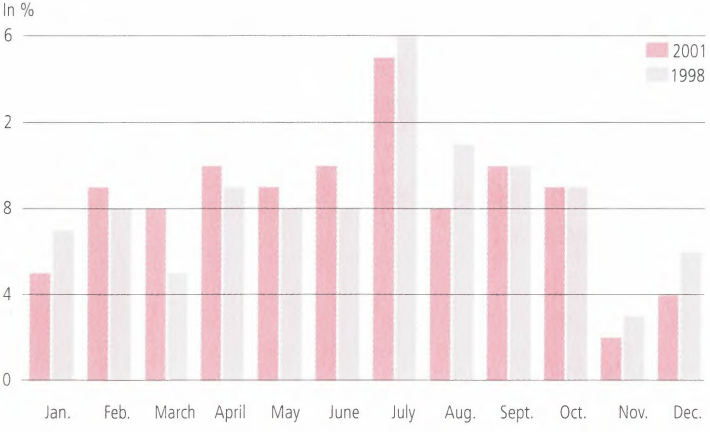
Duration of travel: The trend towards shorter trips seems to have abated (cf. key data on travel intensity). People appear to have exhausted their individual travel-time budgets, as is shown by a stabilization in the number of people going on several trips.



Destinations: On the whole, the choice of destinations has changed little since 1998. Switzerland continues to be the most popular destination: 44% of all travel is to destinations in our own country which has, however, experienced a slight loss of market share since 1998 (–2%). Roughly 34% (+2%) of all travel is to Switzerland's neighbouring countries, while southern Europe accounts for 10%. North and Central America continues to be the most popular overseas destination (3.1%), though with a stagnating market share.



Travel time: A gradual flattening out can be observed for the month of departure.

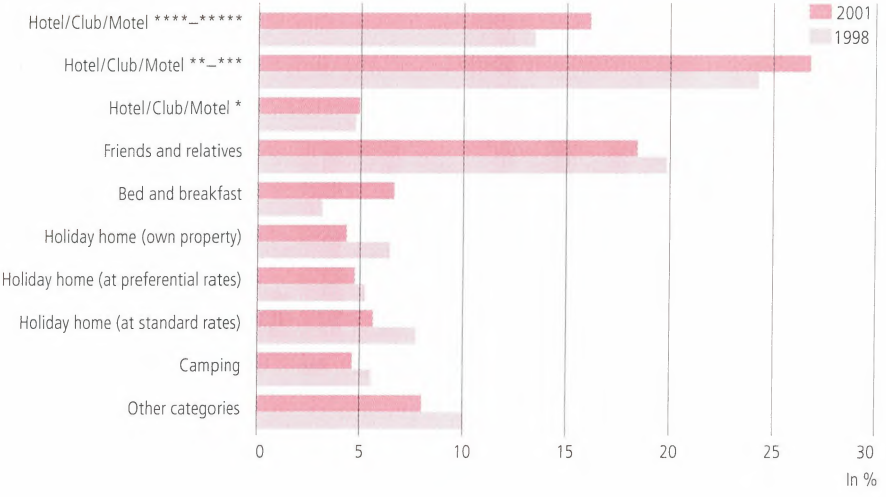


Source pages 30–32: Institute for public services and tourism at the University of St. Gall

Type of travel: 23% of all trips come under the heading «Visiting friends and relatives», 21% under «Beach/lakeside holidays». Winter sports holidays and summer holidays in the mountains (each 13% of all trips) continue to feature among the most popular types of travel.



Accommodation: Swiss people still prefer to stay in a hotel or a holiday apartment, though visits to family and friends remain very popular too. Compared with 1998, alternative forms of accommodation are losing ground to hotels proper.



Volume and revenue shares of international tourism

In 2001, 688.5 million tourist arrivals were reported worldwide, generating revenues to the tune of US $ 475.8 billion in 2000.

Region	Arrivals 2001 [1]		Income 2000	
	in millions	in %	in billion US $	in %
1. Europe	400.5	58.2	231.5	48.7
2. America	119.3	17.3	136.4	28.7
3. East Asia/Pacific	114.9	16.7	82.5	17.3
4. Africa	28.5	4.1	10.7	2.2
5. Middle East/South Asia	25.4	3.7	14.8	3.1
Total	688.5	100.0	475.8	100.0

1) Estimations

Source: World Tourism Organization (WTO, May 2002)

Switzerland's share of worldwide revenue from international tourism is approx. 1.6% in 2000.

GDP share of international tourism in 2000 (OECD members)

1. Greece	8.1%	7. New Zealand	4.1%
2. Hungary	7.1%	8. Poland	3.9%
3. Austria	6.0%	9. Turkey	3.8%
4. Czech Repulic	5.6%	10. Ireland	3.7%
5. Spain	5.5%	11. Belgium	3.5%
6. Portugal	4.9%	**12. Switzerland**	**3.2%**

Source: IMF (GDP) – WTO (receipts) – May 2002

Volume and revenue share worldwide

In 2000, the position of Swiss tourism compared with other countries in regard to arrivals and revenue was as follows:

	Arrivals 2000			Revenue 2000		
Destination	in millions	in %	rank	in billion US $	in %	rank
France	75.5	10.8	1.	29.9	6.3	3.
United States	50.9	7.3	2.	85.2	17.9	1.
Spain	48.2	6.9	3.	31.0	6.5	2.
Italy	41.2	5.9	4.	27.4	5.8	4.
China	31.2	4.5	5.	16.2	3.4	7.
United Kingdom	25.2	3.6	6.	19.5	4.1	5.
Russia	21.2	3.0	7.	7.5	1.6	13.
Mexico	20.6	2.9	8.	8.3	1.7	11.
Canada	20.4	2.9	9.	10.8	2.3	9.
Germany	19.0	2.7	10.	17.8	3.7	6.
Austria	18.0	2.6	11.	11.4	2.4	8.
Poland	17.4	2.5	12.	6.1	1.3	14.
Hungary	15.6	2.2	13.	3.4	0.7	15.
Hong Kong	13.1	1.9	14.	7.9	1.7	12.
Greece	12.5	1.8	15.	9.2	1.9	10.
Switzerland	**11.4**	**1.6**	**16.**	**7.5**	**1.6**	**13.**
Other foreign countries	257.4	36.8		176.7	37.1	
Total	698.8	100.0		475.8	100.0	

Source: World Tourism Organization (WTO, August 2001 and May 2002)

Tourism Associations and Institutes

Tourism Interest Groups and Professional Associations

- **Association of Swiss Navigation Companies**, Ebenaustrasse 10, 6048 Horw, phone +41 (0)41 340 44 74, fax +41 (0)41 340 68 74, www.vssu.ch. Founded: 1898. Tasks: Promotion of navigation on Swiss rivers and lakes, safeguarding the interests of the 13 members 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.
- **Community of interest (directors) of the Higher Schools of Tourism Management Switzerland**, c/o IST AG, Josefstrasse 59, 8005 Zurich, 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 (itw@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 quide and route map) and promotion, «Cycling in Switzerland», HPM at the Expo.02, development of 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 51 11, 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. Training and further training in the hotel and catering trade.
- **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. Training and further 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 of Official Tourist Office Managers**, P.O.Box 824, 8038 Zurich, phone +41 (0)1 481 04 69, fax +41 (0)1 481 04 72, inamiller@compuserve.com. Established in 1928. Objectives: To promote the professional interests of tourist office managers, vocational training and further 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 proprietors 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 further 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 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 agen-

cies in Switzerland to develop professional skills, protect the interests of the profession, professional assistance to SFTA members.

- **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.
- **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, training and further training of host families. Quality standards (seal of quality). Central booking office at Swiss Travel Savings Fund.
- **Swiss Hotel Association (SHA)**, 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, training and further training, consultation, marketing, business management and technical management planning.
- **Swiss Hotel Schools Association (ASEH)**, 1897 Le Bouveret, phone +41 (0)79 402 77 77, fax +41 (0)24 482 88 99, 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, Viktoriastrasse 72, 3030 Berne, phone +41 (0)31 338 49 57, fax +41 (0)31 338 57 15, www.post.ch, info@postauto.ch. Leading provider of regional public road services for passenger transportation. 17 regional postbus centers.
- **Swiss Ski and Snowboard School Association (SSSV)**, 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.
- **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 cure 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 tourism, vacation financing by issuing Reka cheques, foundation and development of REKA vacation centres, vacation apartment rentals.
- **Swiss Travel Association of Retailers (STAR)**, Badenerstrasse 808, 8048 Zurich, 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 at 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 of 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 100 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.
- **Traffic Association of Switzerland (VCS)**, 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 kind of transportation.

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. Assignement: 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, Bundesgasse 8, 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, Bundesgasse 8, 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, secretariate 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, barbara.wenger@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**, Bundeshaus Nord, 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 economics 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.cx.unibe.ch/fif, 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 33 00, fax +41 (0)21 692 33 05. 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.

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 Brussels, Belgium, 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.

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