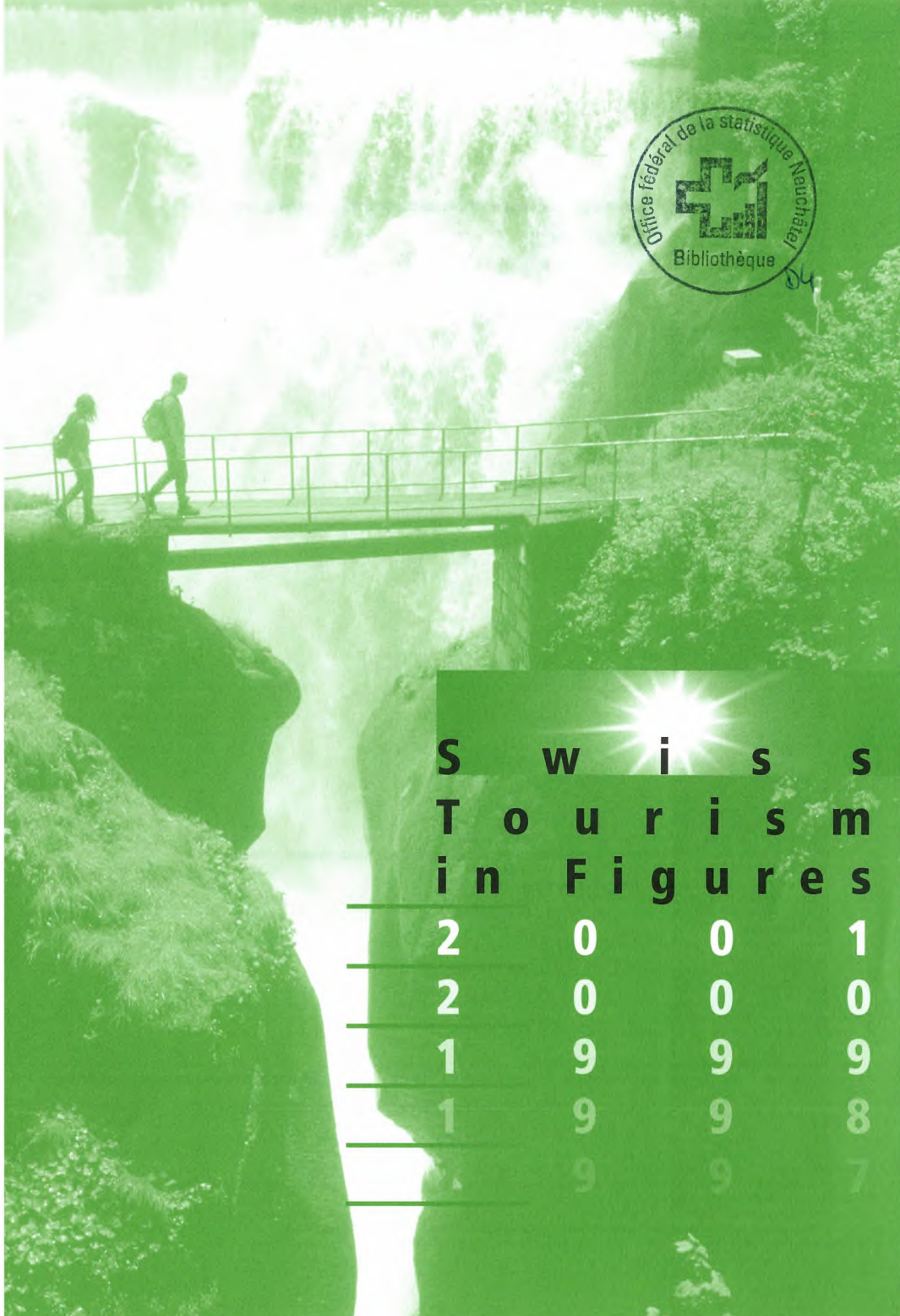


Swiss Tourism in Figures

2001
2000
1999
1998
1997

Contents

Tourism – an important part of the economy 3
Accommodation: Hotels and supplementary accommodation 8
Accommodation: Hotels 10
Accommodation: Supplementary accommodation 19
Catering trade 22
Transport 25
Sports 28
How does the Swiss population travel? 29
Swiss tourism in the international context 33
Tourism Associations and Institutes 35

Edited by

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- Swiss Tourism Federation (STF)
- Switzerland Tourism (ST)

The data in this publication are based on 2000 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 (Mule path near Wassen in the Canton of Uri)

Berne, July 2001/Ordering number: 359-0100

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 22.7 billion Swiss francs in 2000, 9.7 billion (or 43%) came from domestic tourism. Expenditure by foreign visitors in Switzerland added some 13 billion Swiss francs (4% of the Gross Domestic Product).

Total tourism revenue	1989	1994	1999	2000
		in billion Swiss francs		
From domestic tourists	7.1	9.0	9.4	9.7
From foreign tourists	9.9	11.4	11.8	13.0
Total	17.0	20.4	21.2	22.7
Tourism's share of Swiss Gross Domestic Product	5.9%	5.7%	5.4%	5.6%

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)]	1989	1994	1999	2000
		in billion Swiss francs		
1.Metal and machine industry	36.0	38.9	48.9	56.0
2.Chemical industry	17.8	23.5	34.0	36.0
3.Tourism (Tourism balance of payments)	*9.9*	*11.4*	*11.8*	*13.0*
4.Watchmaking industry	6.0	8.0	9.0	10.3
5.Textile industry	4.8	4.3	3.8	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		
	1994	1999	2000	1994	1999	2000	1994	1999	2000
Business & vacation stays	6.8	6.8	7.5	7.4 [1)]	8.7 [1)]	9.3 [1)]	0.8 [1)]	-0.3 [1)]	-0.2 [1)]
Educational & medical stays	1.4	1.6	1.6						
Excursionists, transit visitors	1.9	2.3	2.7	0.9	1.1	1.1	1.0	1.2	1.6
Other tourism	0.5	0.3	0.4	0.5	0.4	0.4	0.0	-0.1	0.0
Consumption expenditure of border-zone inhabitants	0.8	0.8	0.8	0.0	0.0	0.0	0.8	0.8	0.8
Total	11.4	11.8	13.0	8.8	10.2	10.8	2.6	1.6	2.2

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

Hotel guests from abroad spend some 6.4 billion francs

Expenditure by foreign visitors staying overnight in tourist accommodation establishments totalled 7.5 billion francs in 2000, of which four fifths were spent by tourists staying in hotels.

Overnight tourists Year 2000	Expenditure in millions of francs for:			
	lodging	meals	incidentals	total
in hotels	2959.7	1371.4	2020.7	6351.8
in vacation apartments	199.3	232.7	248.5	680.4
at camp grounds	22.5	46.1	48.6	117.2
in group accommodation	37.3	48.9	46.8	133.0
in youth hostels	8.9	8.4	4.5	21.9
with friends and relatives	*	*	*	185.9
Total	*	*	*	7490.2

Source: Federal Statistical Office

Average expenditure of a foreign tourist per overnight stay

Overnight tourists Year 2000	Expenditures in francs for:			
	lodging	meals	incidentals	total
in hotels	147	68	100	315
in vacation apartments	24	28	30	81
at camp grounds	12	25	26	63
in group accommodation	19	24	23	66
in youth hostels	24	23	12	60
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 2000, for instance, they spent the following estimated amounts on:

Gasoline/Petrol	783 million Swiss francs	Crafts, souvenirs and	
Tobacco	252 million Swiss francs	postcards	119 million Swiss francs
Sweets	319 million Swiss francs	Taxi fares	92 million Swiss francs
Inland water transportation	23 million Swiss francs	Sights or points of interest	21 million Swiss francs

Source: Federal Statistical Office

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

Tourism generates employment

Tourism is an important employer in Switzerland. Approximately every eleventh member of the working population is directly or indirectly involved in tourism. In mountain regions, this figure is substantially higher than in urban areas.

Tourism jobs in Switzerland

Directly tourism-related	
Accommodation and restaurant industry, road transport (incl. postal coach service), water transport, air transport, transport agency (travel agencies), culture, sports, relaxation, other branches of the economy (retail trade, news transmission, banks, insurance companies, rentals/leasing, consultancy, personal services, private schools, health care, public sector), holiday houses and apartments, private cars and motorcycles	approx. 208 000
Indirectly tourism related	
Via intermediate consumption (includes all goods or services provided externally: purchases of goods and materials, rentals, transport and energy costs, maintenance and repair costs, advertising) and investments	approx. 92 000
Total employment due to tourism	approx. 300 000

Source: H. Rütter, report entitled «Wertschöpfung des Tourismus in der Schweiz», BIGA, 1991

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						
1999	136414	82188	11246	10152	103586	240000
2000	129705[1)]	82464	12060	10771	105295	235000
Construction industry						
1999	195958	74024	4495	10523	89042	285000
2000	210492[1)]	72155	5454	10899	88508	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 1.7 per cent compared with the same quarter in the previous year, i.e. from 227800 to 224000. The number of full-time jobs has decreased by 4000. Very large changes have taken place in the part-time sector. Whereas the number of part-time employees working 50 to 89 per cent of normal working hours went back by 3500, at the same time the number of part-time staff with a work quota of less than 50 per cent has risen by 3700.

Employees (4th quarter)

	4th quarter 99	4th quarter 2000	Change absolute	Change %
Total full-time employees (90% and over)	158000	154000	-4000	-2.5%
Total part-time employees (50 to 89%)	30000	26500	-3500	-11.7%
Total part-time employees (<50%)	39800	43500	3700	9.3%
Total employees	227800	224000	-3800	-1.7%

Source: Federal Statistical Office

Accommodation: Hotels and supplementary accommodation

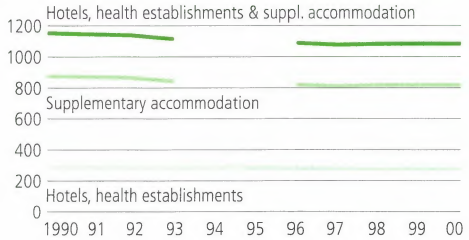
Outline of the accommodation sector

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.

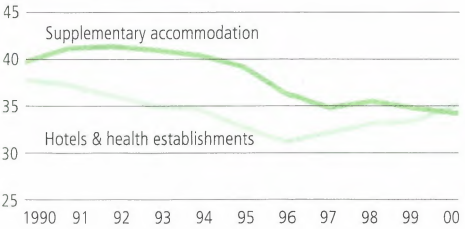
Beds (in thousands)



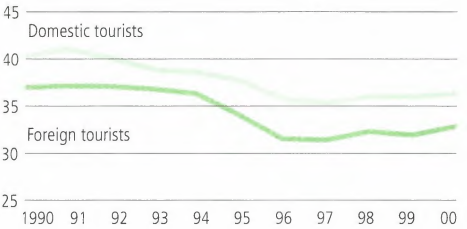
Total overnight stays (in millions)



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	1993	1995[2]	1999	2000	Winter[1] 1998/99	Summer[1] 1999	Winter[1] 1999/00	Summer[1] 2000
Switzerland	38.8	37.6	35.9	36.2	15.8	20.1	15.9	20.3
Total of foreign countries	36.7	34.0	31.9	32.8	14.4	17.4	14.6	18.0
Federal Republic of Germany	16.6	...	13.8	13.5	7.0	6.8	6.8	6.7
United Kingdom	2.4	...	2.3	2.5	1.0	1.2	1.1	1.3
France	2.3	...	1.8	1.9	0.9	0.9	1.0	0.9
Italy	1.7	...	1.4	1.4	0.6	0.8	0.6	0.8
Belgium	2.2	...	1.6	1.6	0.8	0.8	0.8	0.8
Netherlands	3.4	...	2.8	2.8	1.2	1.6	1.2	1.6
Nordic countries[3]	0.6	...	0.6	0.6	0.3	0.3	0.3	0.3
Russia, Federation[4]	...	...	0.1	0.2	0.0	0.1	0.1	0.1
Spain	0.5	...	0.4	0.4	0.1	0.3	0.1	0.3
Austria	0.5	...	0.4	0.5	0.2	0.2	0.2	0.3
Other countries Europe	1.3	...	1.3	1.4	0.7	0.7	0.7	0.7
Europe total (excl. Switzerland)	31.5	...	26.5	26.8	12.8	13.7	12.9	13.8
United States	2.1	...	2.1	2.4	0.6	1.4	0.7	1.7
Canada	0.2	...	0.2	0.2	0.1	0.1	0.1	0.1
Brazil	0.1	...	0.1	0.1	0.0	0.1	0.0	0.1
Other countries America	0.2	...	0.2	0.3	0.2	0.2	0.1	0.1
America total	2.6	...	2.6	3.0	0.9	1.8	0.9	2.0
Japan	0.8	...	0.9	1.0	0.2	0.7	0.2	0.8
Israel	0.3	...	0.3	0.3	0.1	0.2	0.1	0.2
India	0.1	...	0.2	0.2	0.0	0.1	0.0	0.1
Other countries Asia	0.8	...	0.8	0.9	0.2	0.6	0.3	0.7
Asia total	2.0	...	2.2	2.4	0.5	1.6	0.6	1.8
Africa	0.4	...	0.3	0.3	0.1	0.2	0.1	0.2
Australia, Oceania	0.2	...	0.3	0.3	0.1	0.2	0.1	0.2
Other overseas countries	0.6	...	0.6	0.6	0.2	0.4	0.2	0.4
Total	75.5	71.6	67.8	69.0	30.2	37.5	30.5	38.2

1) Winter: November–April; Summer: May–October
2) Estimation
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 2000, this figure had risen to 259700. The number has not significantly changed in recent years, but quality has been widely 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.

5800 hotels with 259700 beds

Year	Number of hotels	Number of beds	
		existing[1)]	available[1)]
1990	6700	269800	222600
1995	6100	264400	222000
1999	5800	259500	219600
2000	5800	259700	219400

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

2000		
Size of establishment	Number of establishments	
	in figures	in%
up to 20 beds	2240	38.9
21–50 beds	2007	34.9
51–100 beds	978	17.0
more than 100 beds	530	9.2
up to 10 rooms	2184	38.0
11–20 rooms	1458	25.3
21–50 rooms	1484	25.8
51–100 rooms	475	8.3
more than 100 rooms	152	2.6

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		
1990	113300	30300	3300	146900
1995	120000	22100	2300	144400
1999	121500	18000	2200	141700
2000	122300	17100	2200	141600

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			
	1990	1995	1999	2000
up to 49.99	41400	14100	17200	18300
50.– to 99.99	63400	54200	53400	52300
100.– to 149.99		38000	36600	36300
150.– and more	42100	38100	34500	34700

Source: Federal Statistical Office

Nearly three-quarters 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	1437690	1093360	2531050
50.– to 99.99	5480111	5189086	10669197
100.– to 149.99	3991835	6170458	10162293
150.– and more	3103675	7461389	10565064

Source: Federal Statistical Office

Operating expenses in percent (1999)

Hotel category	*****	**+*
Direct costs	15.0	25.3
Gross income I	85.0	74.7
Personnel expenses	39.5	31.9
Gross earnings/pay	34.2	26.4
Social costs, personnel insurance, other personnel expenses	5.3	5.5
Gross income II	45.5	42.8
Operating expenses	16.0	12.0
Insurance	0.5	1.5
Utilities (electricity, heating, water)	2.8	3.1
Marketing (incl. commissions)	5.2	2.3
Other operating expenses	7.5	5.1
Operating result I	29.5	30.8
Management costs	5.1	8.3
Operating result II	24.4	22.5
Financial and property expenses		
Maintenance and replacements	7.3	4.0
Gross operating profit	17.1	18.5
Property taxes and insurances	0.6	0.3
Rents	+3.0	+1.6
Rentals (incl. leasing)	2.5	0.8
Interests (incl. land rentals)	4.8	10.2
Operating cash flow	12.2	8.8
Extraord. income & expenditure	+3.5	+2.1
Cash flow	15.7	10.9
Depreciation and amortization	14.8	8.6
Net operating income	0.9	2.3

Source: Swiss Association for Hotel Credit

The Swiss Association for Hotel Credit publishes reliable annual statistics on 467 establishments in Switzerland. The figures published here 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 lake hotels. More details are available on request from the Swiss Association for Hotel Credit (SGH).

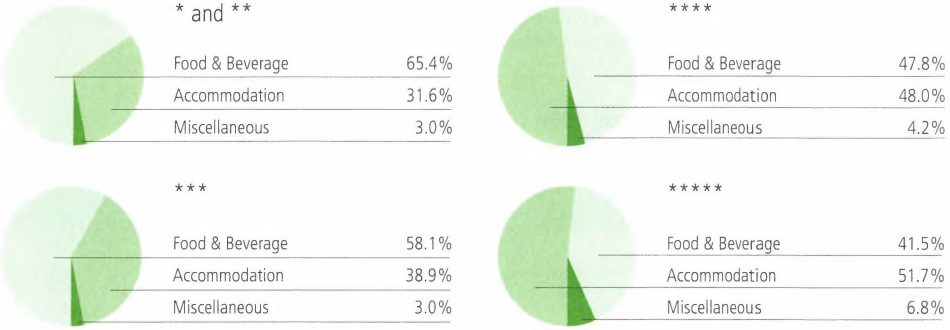
Operating result I according to hotel categories

Operating result I (Total of receipts minus total of expenses)				
*	**	***	****	*****
30.8%	30.8%	28.9%	30.4%	29.5%

* Hotel categories
Source: Swiss Hotel Association

Operating result I is an important index for a hotel's economic evaluation. It is the result before deduction of expenses for maintenance, private cash withdrawals, wages, directors's salaries, administration, taxes, interest and depreciation. The Operating result obtained is often not sufficient to cover all the above-mentioned expenses.

Shares of turnover according to hotel categories



Source: Swiss Association for Hotel Credit

Hotel-Panel 1998

Purpose of the Hotel-Panel 1998

The second edition of the statistically representative Hotel-Panel 1998 for the Swiss hotel industry allows well based statements on the economic situation of the branch as well as on concrete key figures of the individual hotels. The results of the Hotel-Panel 1998 based on 193 Swiss hotels supply important reference values for business consultants, they serve as benchmarks for the analysis and comparison of individual hotels as well as for the analysis of credit requests. The Hotel-Panel is a common project of the Swiss Association for Hotel Credit (SGH), the Federal Statistical Office (FSO) and the Swiss Hotel Association (SHA). The analysis is performed on a yearly basis.

Comments

According to the collected data of the Hotel-Panel 1998 the Swiss hotel industry had a total turnover of approximately CHF 8.30 billion of which 3.41 billion or 41% fall to mere overnight accommodation. The hotel industry is an intensely service-oriented branch: the average staff expenditures amount to 35.5% of the total turnover.[1)] The profit amounts to 6.0% of the total revenue. The degree of immobilisation is considerable with fixed assets of 85.4% of the total assets. As a result of the high intensity of fixed assets the hotel industry has to spend enormous amounts on depreciation, maintenance and interest. Only 10.4% (or approximately CHF 2.1 billion) of the invested capital are financed by own resources. The low ratio of own capital funds results partly from the losses brought forward from the accounts of the previous year. The average hotel realises an accommodation mean of CHF 80 per guest staying overnight (not including value added tax and breakfast).

The total turnover per employee accounts to CHF 103 000 per annum in an average hotel (productivity). After the deduction of the advanced expenditures a gross product of CHF 60 000 results. In comparison an employee costs around CHF 43 000.

1) The mentioned characteristic figure does often not include the salary of the owner and should therefore be a little higher. This is particularly true for medium and small size hotels.

Hotel-Panel 1998

Means	City	Montain	Lake	Others	Switzerland (all regions)
Total turnover in 1000 CHF	4717	1733	1800	1177	1676
Staff expenditures in 1000 CHF	2056	708	761	485	698
Staff expenditures in % of total turnover	41.4	34.8	37.6	34.3	35.5
Operating result I in % of total turnover	26.2	25.2	26.6	24.7	25.3
Cash flow in % of total turnover	14.3	16.7	11.5	12.7	14.0
Gain/Loss in % of total turnover	5.2	7.6	3.1	5.9	6.0
Fixed assets in % of total assets	77.0	90.4	87.8	81.0	85.4
Equity capital in % of total capital	16.7	17.0	10.3	3.9	10.4
Accommodation mean in CHF	130	82	80	73	80
Turnover per employee in 1000 CHF	117662	103653	96611	104517	103414
Gross product per employee in CHF	73509	60729	57521	56936	59263
Staff expenditures per employee in CHF City	49945	42045	43703	42519	42955

Explanations:
Accommodation mean in CHF = Accommodation revenue/number of overnights
Turnover per employee in 1000 CHF = Total turnover/number of employees
Gross product per employee in CHF = (Total turnover – advance expenditures)/number of employees
Staff expenditures per employee in CHF = Staff expenditures/number of employees
Source: Swiss Hotel Association

The majority of hotel guests are from abroad

Overnight stays by country of residence of guests				
Country of residence	1990 millions	1995 millions	1999 millions	2000 millions
Switzerland	14.7	12.9	13.6	14.0
Total of foreign countries	21.0	18.4	18.5	19.9
Federal Republic of Germany	6.5	6.6	6.3	6.4
United Kingdom	2.0	1.3	1.8	1.9
France	1.5	1.2	1.1	1.2
Italy	1.4	0.8	0.9	1.0
Belgium	0.9	0.9	0.8	0.8
Netherlands	0.9	0.8	0.8	0.9
Nordic countries [1]	0.5	0.4	0.4	0.3
Russia, Federation [2]	...	...	0.1	0.2
Spain	0.5	0.3	0.3	0.3
Austria	0.4	0.3	0.3	0.3
Other countries Europe	0.9	1.0	0.9	1.2
Europe total (excl. Switzerland)	15.5	13.6	13.7	14.5
United States	2.5	1.7	1.9	2.2
Canada	0.2	0.2	0.2	0.2
Brazil	0.1	0.1	0.1	0.1
Other countries America	0.3	0.2	0.1	0.2
America total	3.1	2.2	2.3	2.7
Japan	0.8	0.9	0.9	1.0
Israel	0.3	0.2	0.2	0.2
India	0.1	0.1	0.2	0.2
Other countries Asia	0.7	1.0	0.7	0.8
Asia total	1.9	2.2	2.0	2.2
Africa	0.4	0.3	0.3	0.3
Australia, Oceania	0.2	0.2	0.2	0.2
Other overseas countries	0.6	0.5	0.5	0.5
Total	35.8	31.2	32.1	33.9

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

Graubünden 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 mentioned cantons and parts of Solothurn), both since 1998.

Regions Year 2000	Supply		Overnight stays in millions			Occupancy in % of available…	
	Available rooms	Available beds	Swiss	Foreigners	Total	rooms	beds
Grisons	17472	33385	2.8	3.2	6.0	52.6	48.8
Central Switzerland	13634	25358	1.4	2.2	3.6	45.5	38.8
Valais	13473	26275	1.8	2.4	4.2	46.1	43.3
Bernese Oberland	11288	20966	1.4	2.2	3.6	49.2	47.0
Zurich	10914	18385	1.0	2.6	3.6	68.7	52.6
Ticino	9512	18348	1.5	1.5	3.0	49.5	43.9
Vaud	9480	17589	0.9	1.6	2.5	47.7	38.2
Eastern Switzerland	9356	16753	1.1	0.7	1.8	37.1	29.2
Swiss Mittelland	9082	15570	1.1	0.9	2.0	45.8	34.9
Geneva	7941	13003	0.4	2.0	2.4	62.5	49.3
Fribourg-Neuchâtel-Jura	4132	7914	0.4	0.3	0.7	30.9	22.3
Basle-City/Basle-Country	3642	5848	0.3	0.5	0.8	52.0	40.5
Switzerland	119926	219394	14.0	19.9	33.9	49.7	42.3

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
1990	79400	46500	32200	64500	36	21	14	29
1995	79600	46500	30100	65800	36	21	13	30
1999	77100	46300	30400	65800	35	21	14	30
2000	76900	46000	31000	65600	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
1990	13.6	7.9	6.2	8.1	38	22	17	23
1995	12.6	6.5	5.1	7.0	40	21	17	22
1999	12.2	7.0	5.6	7.4	38	22	17	23
2000	13.0	7.4	6.0	7.6	38	22	18	22

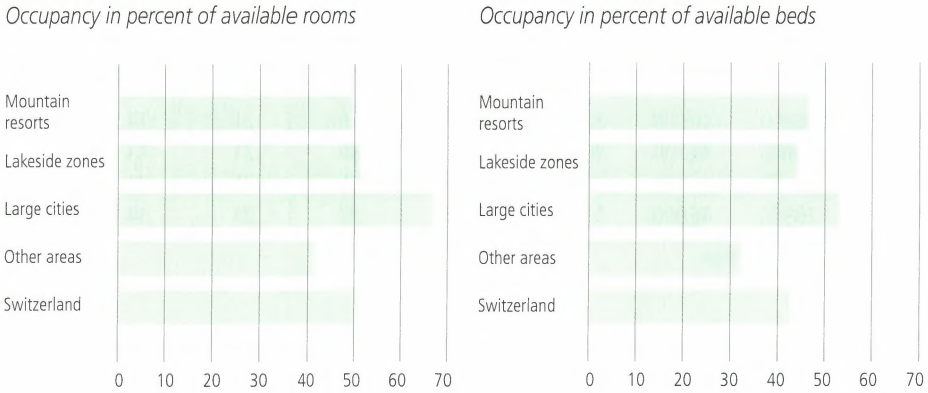
Source: Federal Statistical Office

2000: Shares of domestic and foreign overnight stays in hotels vary according to the areas



Source: Federal Statistical Office

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)]
1990	34	47	39	47	52	53	31	34
1995	32	43	33	39	45	47	27	29
1999	32	43	35	41	49	50	28	31
2000	34	46	37	44	52	53	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

Summer	56.9%	Winter	43.1%

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, Graubünden, 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.

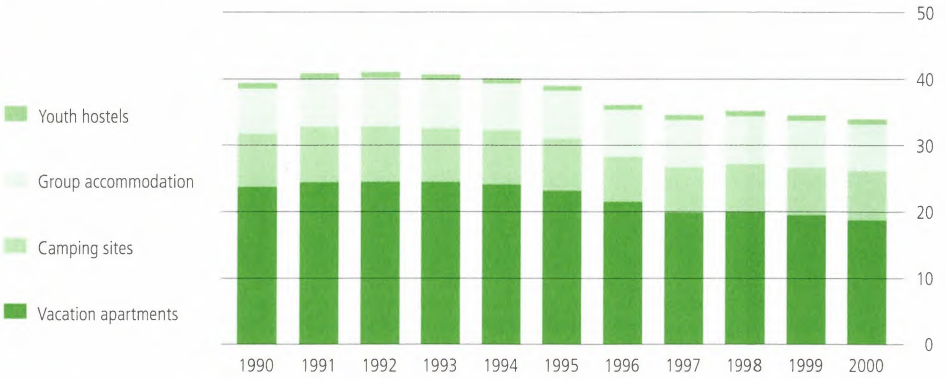
Beds/lodgings in supplementary accommodation

Types of accommodation	1990		1995		1999		2000	
	Number	in %	Number	in %	Number	in %	Number	in %
Vacation apartments	360000[1)]	42	360000[1)]	...	360000[1)]	45	360000[1)]	45
Camping sites	267000	31	...	...	209000	26	210000	26
Group accommodation	229000	27	...	...	232000	29	230000	29
Youth hostels	8100	1	...	...	6600	1	6200	1
Total	864100	100	...	...	807600	100	806200	100

1) As per 1986 survey

Source: Federal Statistical Office

Vacation apartments account for 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

Country of residence	1989/90[1] in millions	1994/95[1] in millions	1998/99[1] in millions	1999/00[1] in millions
Switzerland	23.9	23.8	21.5	21.4
Total of foreign countries	15.5	15.2	13.1	12.6
Federal Republic of Germany	8.1	...	7.3	6.8
United Kingdom	0.8	...	0.5	0.6
France	0.9	...	0.6	0.7
Italy	0.5	...	0.4	0.4
Belgium	1.1	...	0.9	0.8
Netherlands	2.4	...	1.9	1.9
Nordic countries[2]	0.2	...	0.2	0.2
Russia, Federation[3]	...	...	0.0	0.0
Spain	0.2	...	0.1	0.1
Austria	0.2	...	0.1	0.1
Other countries Europe	0.4	...	0.5	0.4
Europe total (excl. Switzerland)	14.8	...	12.5	12.0
United States	0.3	...	0.2	0.2
Canada	0.0	...	0.0	0.0
Brazil	0.0	...	0.0	0.0
Other countries America	0.1	...	0.1	0.1
America total	0.4	...	0.3	0.3
Japan	0.0	...	0.0	0.0
Israel	0.1	...	0.0	0.1
India	0.0	...	0.0	0.0
Other countries Asia	0.1	...	0.2	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	39.4	39.0	34.6	34.0

1) November–October
2) Denmark, Finland, Norway, Sweden and since 1.1.1994 Iceland
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 1999/00[1]				
	Vacation apartments	Camping sites	Group accommod.	Youth hostels	Total
Switzerland	10383000	5573109	4986301	436542	21378952
Total of foreign countries	8386984	1868801	2013305	367043	12636133
Federal Republic of Germany	4992568	819618	916089	119998	6848273
Netherlands	1205202	585187	83680	10293	1884362
Belgium	489968	40237	253401	6446	790052
France	411852	64619	156846	16972	650289
United Kingdom	312430	93522	139497	17237	562686
Italy	268473	85031	65592	13100	432196
United States	91152	9845	104420	31151	236568
Austria	56791	21399	20189	4505	102884
Spain	41694	31225	15515	11643	100077
Australia/Oceania	9168	8815	39836	16415	74234
Luxembourg	43932	3762	14285	194	62173
Other foreign countries	463754	105541	203955	119089	892339
Total	18769984	7441910	6999606	803585	34015085

1) November–October

Source: Federal Statistical Office

More overnight stays in supplementary accommodation during the summer season

Winter	46%	Summer	54%

Source: Federal Statistical Office

Types of accommodation	Overnight stays in supplementary accommodation	
	Winter Nov. 1999–April 2000 in millions	Summer May–Oct. 2000 in millions
Vacation apartments	11.3	7.5
Camping sites	0.9	6.6
Group accommodation	3.2	3.8
Youth hostels	0.3	0.5
Total	15.5	18.5

Source: Federal Statistical Office

The Swiss catering trade is an important sector of the economy: dynamic and innovative

The guest is always the centre of attention, is spoiled and courted. The opening hours, but also the range are increasingly aimed to meet market requirements. Living hospitality becomes the real trademark.

The catering trade as a key element in the tourist industry is among the most important sectors in our national economy, it is also an important buyer of domestic products (agriculture, commerce) and an important currency earner («invisible export»).

There is an extremely large and widely varied range of hotel and catering services on offer in Switzerland: some 28300 catering establishements of the most diverse kind and organisation, from unspoiled village taverns through trendy restaurants with foreign and exotic cuisine, splendid country inns, simple and comfortable hotels to top restaurants and luxury hotels.

There is one restaurant per every 250 inhabitants. The extremely high density of catering establishments brings hard competition which, admittedly, means an enormous challenge and an incentive to improve performance. The catering trade achieves a total annual turnover of approx. 23 billion Swiss francs.

The catering trade is one of the most important employers providing some 224000 jobs; the total wage bill was estimated at well over 9 billion Swiss francs. The catering trade is an attractive employer for apprentices too. The number of apprentices employed in catering has continually risen since 1991.

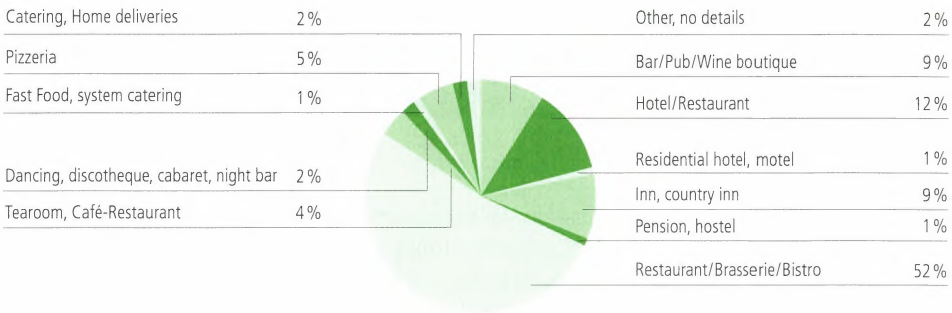
The catering trade is also a major customer (construction industry, banks, local services, specialist trade) and thus a quite important indirect employer in addition.

Source: Gastroconsult Ltd./GastroSuisse, 2001 Survey of the sector (Branchenspiegel)

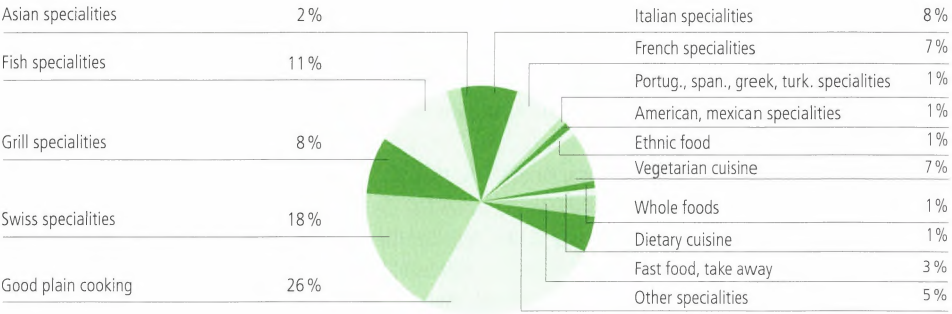
Business size: number of seats per restaurant



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

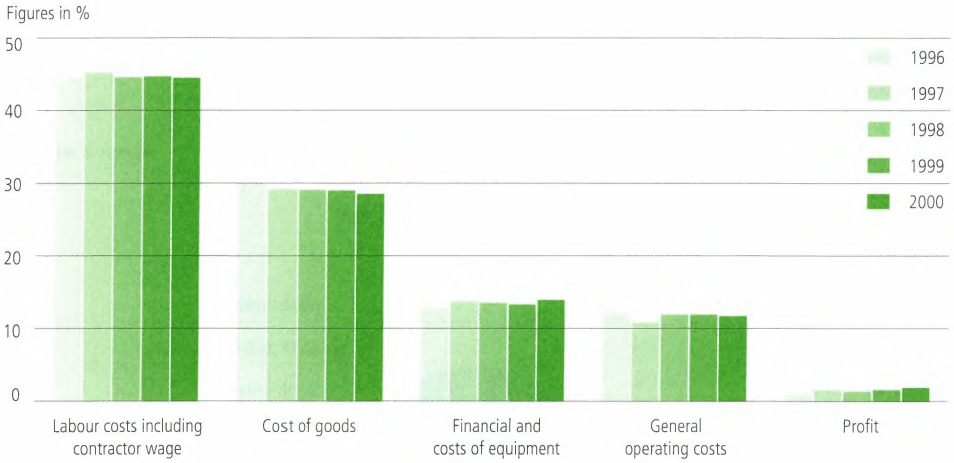


The offer of «good plain cooking» and Swiss specialities still most popular



Catering industry – slight rise in profit

The costs structure since 1996 (on average of all the restaurants participating in the survey)



An analysis of the long-term cost structure development shows that the staff cost proportion was slightly lower in 2000 (-0.2%).

Two factors contributed to the reduction of the staff cost proportion: various establishments were unable to reduce their staff in the short-term during the past few years despite a decline in turnover. The slight turnover increase in 2000 therefore was realized without any additional staff; staff costs consequently were reduced. Besides this, it has been shown that the proportion of management salary was reduced in various establishments. The staff costs for wage-earning staff, therefore, have hardly dropped. This development is, at the same time, an explanation for the slight rise in profit.

Somewhat more pronounced was the decline in the proportion of merchandise costs (-0.5%).

On average, merchandise cost makes up less than one third of the sales price. Too many guests are unaware of this fact. They often unjustly criticize the price structure because they quite falsely consider the difference between merchandise cost and sales price as being the catering establishment's «profit». Staff costs are of greater emphasis and are underestimated in their significance.

A wide variety of transport

Vacation and business travel in Switzerland is done by private car in approximately two thirds of all cases. About one fifth of tourists travel by train, 10% by plane and 4% by bus. Postbuses, lake steamers and mountain railways/ropeways are important secondary means of transport, primarily for excursions.

Public transport

One of the densest railway networks in the world

- The Swiss railway network is approx. 5100 kilometres long:
- standard gauge: 3640 km, 3000 km of which are used by Swiss Federal Rail-ways
- narrow gauge: 1386 km, 97 km of which are cog-wheel tracks
- The Swiss Federal Railways run some 4000 passenger trains covering approximately 248000 kilometers every day. About half of the trains are Eurocity, Intercity and other fast trains, the other half are local and commuter trains. In 1999, 260 million passengers used Swiss Federal Railways; 47 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.
- 716 postal coach routes result in a total route network of 8500 km (2.5 times the length of the federal railway network).
- 2065 postal coach drivers transported 93 million passengers in 1879 coaches (69000 seats), thereby covering an average of 213000 km each day or 80 million km in total. 1879 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, 552379 take-offs and landings with approx. 33.9 million passengers were registered in 2000, some 90% of whom used regular scheduled airlines.
- Approx. 11.2% of visitors to Switzerland arrive by plane.
- 59.8% of passengers at Swiss airports travel on Swiss airlines.
- At the beginning of 1999, Swissair's network comprised 487991 km with 140 destinations in 76 countries.

Bustling navigation on Swiss lakes

Year	Licensed boats on Swiss lakes and rivers	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 1821 tourism transport facilities in Switzerland: 12 cog-wheel trains, 59 funiculars, 214 aerial cableways, 124 gondola lifts, 307 chair-lifts, as well as 1104 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 and motorcycles (holiday traffic)		
	1989	1994	1999[1]
Fed. Republic of Germany	16 633	19 454	20 349
France	10 324	11 602	13 233
Italy	15 188	12 044	14 720
Austria	3272	3525	3424
Other foreign countries	2634	2425	2468
Total	48 051	49 050	54 194

1) New method of survey since 1995
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	Change in %
Berne	202035	224182	11.0
Grisons	713660	731789	2.5
Eastern Switzerland	93144	101055	8.5
Vaud	182271	185886	2.0
Valais	696866	673432	-3.4
Western Switzerland	36018	38564	7.0
Central Switzerland	125729	126185	0.4
Ticino	23125	21577	-6.7
Total	2072848	2102670	1.4

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

Cycleland Switzerland

The third season was also a resounding success for Cycleland Switzerland: 3.4 million cyclists rode 155 million kilometres. About 125000 cyclists travelled along the route network for several days and generated some 340000 overnight stays. Services and goods for a total value of 155 million francs were consumed. Cycle tourists spent 140 francs and day excursionists 30 francs per day.

The hotel – still the number one for overnight stay accommodation

Hotel	Camping	Youth hostel	Sleeping in hay	Bed & breakfast	Private	Others	Total
233000	41000	29000	4000	6000	17000	8000	338000

Table: Annual number of overnight stays of all cycle tourists on the national routes
Source: Cycling in Switzerland

Findings from Reisemarkt Schweiz (Swiss travel market survey)

Since 1970, the IDT-HSG Institute for public services and tourism has been carrying out surveys at regular intervals into the travelling behaviour of the resident population of Switzerland. The most recent survey (Reisemarkt Schweiz 1998) was headed for the first time by Dr Christian Laesser, who is also the person to contact for any questions arising from it (christian.laesser@unisg.ch).

Reisemarkt Schweiz 1998 provides the most extensive database currently available in Switzerland covering private travel made by the Swiss population with destinations both in Switzerland and abroad for the year 1998 (01.01.–31.12.). Here private travel is considered to be all trips carried out by a person involving at least one night spent away from the place of residence and which were expressly described by the persons questioned as not being connected with business nor professionally motivated.

Key data on the travelling behaviour

The economic downturn of the mid 1990s seems to have been overcome. While at that time (the lowest point) «only» 75% of the Swiss population took trips involving 3 or more overnight stays, in 1998 it was nearly 80%. However it has not (yet) been possible to regain the highest levels seen in 1990 and 1992 (83%). The picture was somewhat different when considering all trips of at least 1 overnight stay: nearly 85% of all persons spent at least one night away from home in 1998.

Net travel intensity for trips of 3+ overnight stays in comparison

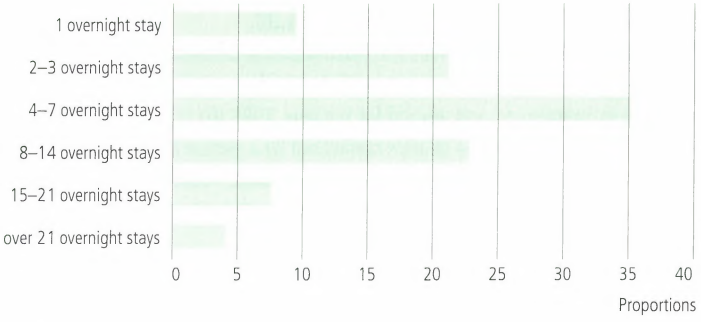
1990	1992	1995/96	1998
83%	83%	75%	79%

Key data for travel with at least 1 overnight stay

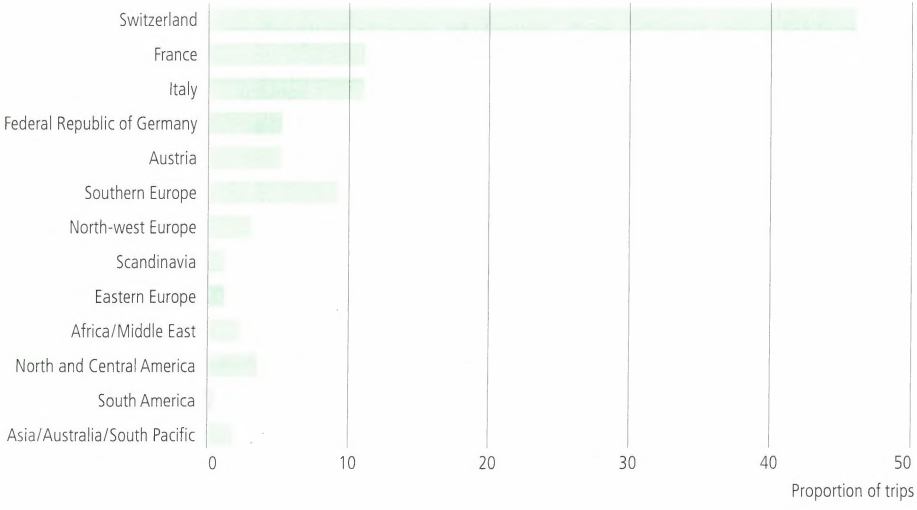
Key figures	1995/96	1998
Net travel intensity in % (Proportion of the population which had undertaken at least one trip)	79	84
Multiple travellers (with more than 1 trip in % of all travellers)	72	70
Gross travel intensity in % (number of trips per 100 inhabitants)	225	232
Travel frequency (Number of trips per traveller)	2.85	2.77

Source pages 29–32: Institute for public services and tourism at the University of St. Gall

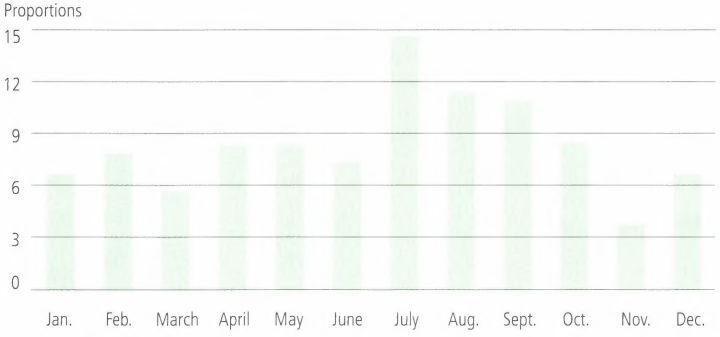
Duration of the trips: The trend towards shorter trips continues unabated. That time clearly appears to be in ever shorter supply is expressed in the fact that those taking a trip travel less often than before. Not only that, the number of those persons travelling more than once is again declining slightly.



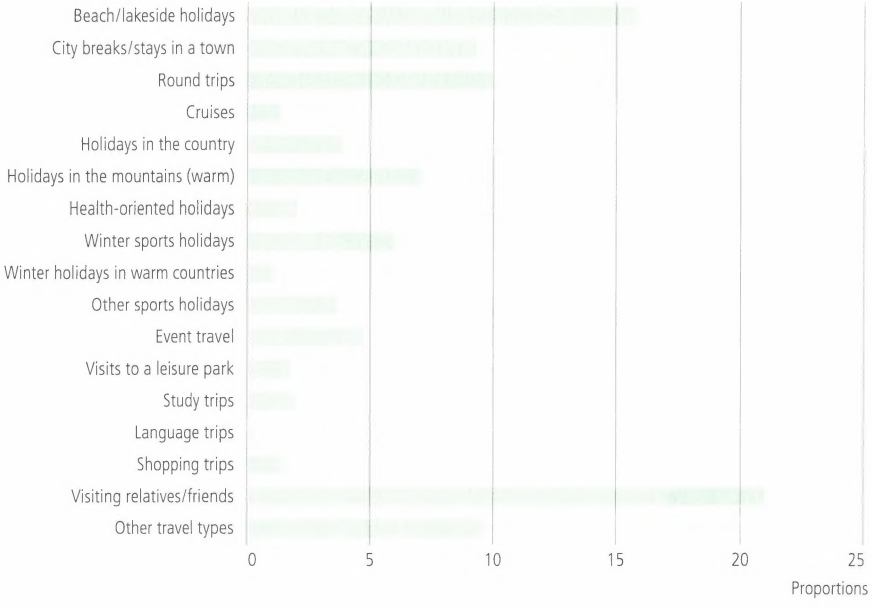
Destinations: Switzerland continues to be the most popular destination: 46% of all travel is to destinations in our own country. Here Switzerland's market share is growing slightly. The Canton of Grisons with almost 9% of all travel enjoyed above-average popularity. Around 32% of all travel is to Switzerland's neighbouring countries and 10% to southern Europe. The most popular overseas destination continues to be North and Central America (3.4%) although this is now growing only slowly.



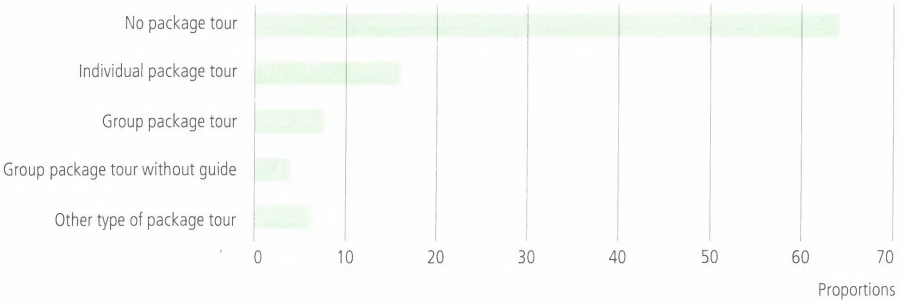
Travelling times: the months of July/August/September are the favourites among the Swiss: in 1998, 37% of all trips began in the summer months. In the other months no particular peaks are discernible, with the exception of November in which the lowest number of trips is started: in July (the peak month) around four times as many people travel as in November.



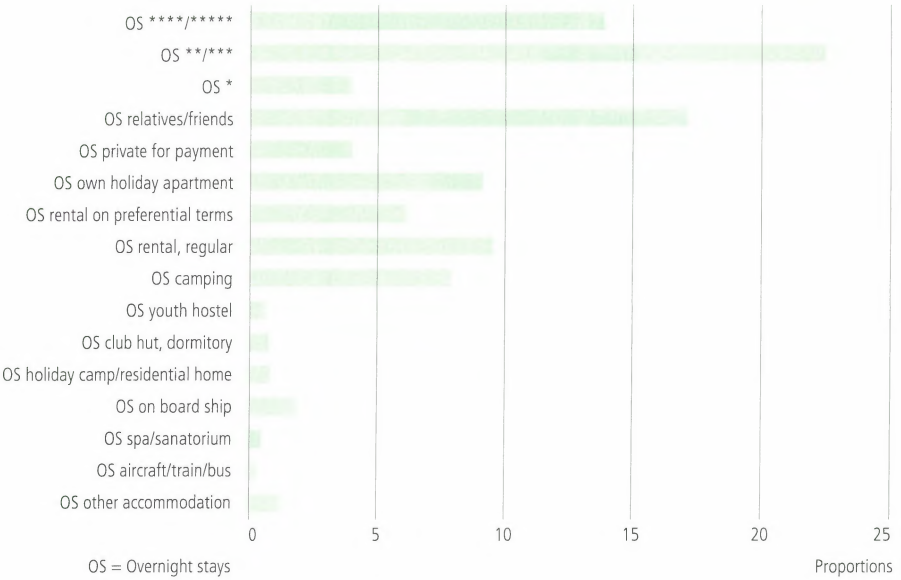
Type of travel: 20% of all trips fall under the heading «Visiting relatives/friends», 15% under «Beach/lakeside holidays».



Travel organisation: The organisation (tour operating) for the majority of all trips was again undertaken by the travellers themselves (64%) in 1998. The three major tour operators (Kuoni, ITV, Hotelplan) were responsible for around 10% of all trips. The remaining 26% is divided up between a large number of other operators.



Overnight stays: The Swiss still prefer to stay in a hotel or a holiday apartment. Visits to relatives and friends continue to enjoy undiminished popularity. However, the largest growth is shown in the categories «Camping» and «Own holiday» apartment. On the other hand, the loser is the one-star-hotel sector which only occupies a very small market share.



Volume and revenue shares of international tourism

In 2000, 697.6 million tourist arrivals were reported worldwide generating revenue to the tune of US $ 475.8 billion.

Region	Arrivals 2000		Income 1999	
	in millions	in %	in billion US $	in %
1. Europe	402.6	57.7	232.8	51.2
2. America	128.9	18.5	122.4	26.9
3. East Asia/Pacific	111.7	16.0	75.2	16.5
4. Africa	27.6	4.0	10.3	2.3
5. Middle East/South Asia	26.7	3.8	14.3	3.1
Total	697.6	100.0	455.1	100.0

Source: World Tourism Organization (WTO, May 2001)

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

GDP share of international tourism in 1999 (OECD members)

1. Greece	7.0%	7. Poland	3.9%
2. Hungary	7.0%	8. New Zealand	3.8%
3. Austria	6.0%	9. Ireland	3.6%
4. Czech Repulic	5.7%	10. Switzerland	3.0%
5. Spain	5.4%	11. Belgium	2.8%
6. Portugal	4.5%	12. Turkey	2.8%

Source: IMF (GDP) – WTO (receipts) – April 2001

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 1999		
Destination	in millions	in %	rank	in billion US $	in %	rank
France	75.5	10.8	1.	31.5	6.9	3.
United States	50.9	7.3	2.	74.9	16.5	1.
Spain	48.2	6.9	3.	32.4	7.1	2.
Italy	41.2	5.9	4.	28.4	6.2	4.
China	31.2	4.5	5.	14.1	3.1	7.
United Kingdom	25.3	3.6	6.	20.2	4.4	5.
Russia	21.2	3.0	7.	7.5	1.7	12.
Mexico	20.6	3.0	8.	7.2	1.6	13.
Canada	20.4	2.9	9.	10.2	2.2	9.
Fed. Rep. of Germany	19.0	2.7	10.	16.7	3.7	6.
Austria	18.0	2.6	11.	12.5	2.7	8.
Poland	17.4	2.5	12.	6.1	1.3	15.
Hungary	15.6	2.2	13.	3.4	0.8	16.
Hong Kong	13.1	1.9	14.	7.2	1.6	14.
Greece	12.5	1.8	15.	8.8	1.9	10.
Schwitzerland	11.0	1.6	17.	7.7	1.7	11.
Other foreign countries	256.5	36.8		166.3	36.6	
Total	697.6	100.0		455.1	100.0	

Source: World Tourism Organization (WTO, May 2001)

International Tourism Organizations

- **European Travel Commission (ETC)**, 61, rue du Marché aux Herbes, B-1000 Brussels, Belgium, phone +32 (2) 504 03 03, fax +32 (2) 514 18 43, E-mail: etc@planetinternet.be. Homepage: www.etc-europe-travel.org.
- **HOTREC**, 111, Boulevard Anspach, Box 4, B-1000 Brussels, Belgium, phone +32 (2) 513 63 23, fax +32 (2) 502 41 73, E-mail: main@hotrec.org. Homepage: www.hotrec.org.
- **World Tourism Organization (WTO)**, Capitàn Haya 42, E-28020 Madrid, Spain, phone +34 915 678 100, fax +34 915 713 733, E-mail: omt@world-tourism.org. Homepage: www.world-tourism.org.

Tourism Interest Groups and Professional Associations

- **Automobile Club of Switzerland (ACS)**, Wasserwerkgasse 39, 3000 Berne 13, phone +41 (0)31 328 31 11, fax +41 (0)31 311 03 10. E-mail: acszv@acs.ch. Homepage: www.acs.ch. Established in 1898. Objectives: To safeguard the interests of motorists, legal counseling and support, emergency road service, tourist service.
- **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. E-mail: info@veloland.ch. Homepage: www.cycling-in-switzerland.ch. Established in 1995, foundation for the purpose of implementing and maintaining a cycle touring track network with nine national routes and promotion of Human Powered Mobility. Tasks: uniform signposting, quality development, information (route guides and map) and promotion.
- **GastroSuisse**, Blumenfeldstrasse 20, P.O. Box, 8046 Zurich, phone +41 (0)1 377 51 11, fax +41 (0)1 371 89 09. E-mail: info@gastrosuisse.ch. Homepage: www.gastrosuisse.ch. Established: 1891. Largest association for the hotel and catering trade with more than 20000 members; about 80 per cent of all Swiss hotels, restaurants, etc. are joined together in GastroSuisse. 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. E-mail: info@hotelgastrounion.ch. Homepage: www.gastroline.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. E-mail: info@voev.ch. Homepage: www.voev.ch. Established in 1889. Objectives: To safeguard the interests of members, to encourage cooperation among members, information and consultation services, training of professionals.
- **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. E-mail: 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-holder (SCV)**, Bleicherweg 54, 8039 Zurich, phone +41 (0)1 201 67 77, fax +41 (0)1 201 68 77. 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. E-mail: info@seilbahnen.org. Homepage: www.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.
- **Swiss Camp Sites Association**, Central Secretariate, 3800 Interlaken, phone +41 (0)33 823 35 23, fax +41 (0)33 823 29 91. 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. E-mail: web.railinfo@sbb.ch. Homepage: www.sbb.ch. The Swiss Federal Railwys 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. E-mail: mail@srv.ch. Homepage: www.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 Health Hotels**, Oberdorfstrasse 53b, 9100 Herisau, phone +41 (0)71 350 14 14, fax +41 (0)71 350 14 18. E-mail: info@wohlbefinden.com. Homepage: www.wohlbefinden.com. Established in 1992. Representing the interests of health hotels, rehabilitation and convalscent 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. E-mail: r.barth@tele-net.ch. Homepage: www.bauernhof-ferien.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. E-mail: shv@swisshotels.ch. Homepage: www.swisshotels.ch. Established in 1882. National association of the leading and classified hotels in Switzerland. Some 2600 members with 175 000 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, E-mail: info@aseh.ch. Homepage: www.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. E-mail: info@postauto.ch. Homepage: www.post.ch. Leading of regional public road services for passenger transportation. 17 regional postbus centers.
- **Swiss Ski and Snowboard School Association (SSSV)**, 7526 Cinuos-chel, phone +41 (0)81 854 07 77, fax +41 (0)81 854 00 53. E-mail: sssa@compunet.ch. Homepage: www.swiss-ski-school.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**, Rosenbergweg 10c, P.O. Box, 6301 Zug, phone +41 (0)41 726 30 03, fax +41 (0)41 726 30 04. E-mail: info@baeder-verband.ch. Homepage: www.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. E-mail: stv@swisstourfed.ch. Homepage: www.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. E-mail: info@reka.ch. Homepage: www.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)**, Zürcherstrasse 51, 8903 Birmensdorf, phone +41 (0)1 739 10 16, fax +41 (0)1 739 10 15. E-mail: star@star.ch. Homepage: www.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. E-mail: bookingoffice@youthhostel.ch. Homepage: www.youthhostel.ch. Established in 1924. Objectives: Pro-

motion of youth travel, accommodation for young travellers, youth groups, schools, families, etc.

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

- **Switzerland Destination Management Ltd**. Headquarter: Tödistrasse 51, P.O. Box, 8027 Zurich, phone +41 (0)1 205 93 93, fax +41 (0)1 205 93 99. E-mail: mail@sdm.ch. Homepage: www.sdm.ch. Information and booking: 0800 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. E-mail: info@tourex.ch. Homepage: www.tourex.ch. TOUREX comprises more than 100 active members 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 postgraduate 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. Homepage: 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. 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, 8039 Zurich, phone +41 (0)1 209 16 16, fax +41 (0)1 209 16 17. E-mail: info@sgh.ch. Homepage: www.sgh.ch. Established in 1967. Objectives: To guarantee or grant credits for the renovation of hotels and health establishments and for the construction of new hotels.

- **Switzerland Tourism (ST)**, Tödistrasse 7, 8027 Zurich, phone +41 (0)1 288 11 11, fax +41 (0)1 288 12 05. E-mail: info@switzerlandtourism.ch. Homepage: www.MySwitzerland.com. Established in 1917. Offices in 20 countries. Objectives:

to increase the demand for Switzerland as a travel, holiday- and congress destination.

Federal institutes

- **Federal Government Commission for Tourism**, Secretariate, 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. Homepage: 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. E-mail: barbara.wenger@bfs.admin.ch. Homepage: www.statistik.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. E-mail: webmaster@bav.admin.ch. Homepage: www.bav.admin.ch. Established in 1873. Objectives: Within the tourism framework, the Federal Transport Office is responsible for issuing aerial cableway licences.

Institutes of higher education

- **Institute for public services and tourism (IDT-HSG)** 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. E-mail: idthsg@unisg.ch. Homepage: www.idt.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. E-mail: fif@fif.unibe.ch. Homepage: www.cx.unibe.ch/fif. 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 diplo-

mas from hotel and tourism vocational colleges. Basic research, expert opinion activity.

Schools of Tourism Management

- **Höhere Fachschule für Tourismus Graubünden/Academia Engiadina**, Quadratscha 18, 7503 Samedan, phone +41 (0)81 851 06 11, fax +41 (0)81 851 06 46. E-mail: hft@academia-engiadina.ch. Homepage: www.academia-engiadina.ch. The college of tourism management offers a three-year study in which prospective tourism specialists are prepared for managerial jobs and jobs regarding special fields of tourism. Specialities of the HFT Graubünden (Grisons) are along with the possibility of doing some of the studies in English, the electives such as Marketingplaner and PR-assistant.
- **Institut für Tourismuswirtschaft (ITW)** an der Hochschule für Wirtschaft Luzern, Zentralstrasse 18, 6002 Luzern, phone +41 (0)41 228 41 45, fax +41 (0)41 228 41 31. E-mail: itw@hsw.fhz.ch. Homepage: www.itw.ch. Foundation: 1993. Areas of activity: Applied research, consultancy, postgraduate courses and programs of complementary and continuing education and training in all areas of tourism with priority on e-business, events and performance.
- **International School of Tourism Management Zurich (IST)**, Josefstrasse 59, 8005 Zürich, phone +41 (0)1 440 30 90, fax +41 (0)1 271 71 17. E-mail: istinfo@ist-zurich.ch. Homepage: www.ist-zurich.ch. Federally recognised school. Introductory and basic courses in tourism, management course to become a Tourism Specialist and further study to get the diploma Swiss Graduate Tourism Executive.
- **Scuola superiore alberghiera e del turismo**, Viale Stefano Franscini 32, 6501 Bellinzona, phone +41 (0)91 821 60 10, fax +41 (0)91 821 60 19. E-mail: infossat@icec.ti-edu.ch. Homepage: www.ssat.ch. The SSAT is comprised of three different sections: hotel secretaries, hotel management and tourism and travel specialists (the diplomas of latter two recognized on a federal level). Since 1998, the Institute for Tourism Management IMAT is active in the fields of research, consulting, project management and continuous education.
- **Swiss School of Tourism (EST-STF)** of Sierre, av. du Rothorn 2, 3960 Sierre, phone +41 (0)27 452 62 30, fax +41 (0)27 452 62 22. E-mail: info.est-stf@hevs.ch. Homepage: www.est-stf.ch. French-German bilingual school. Degree in tourism management (3 years), fully accredited by the Swiss Ministry of Education. Continuing education courses: tourism assistant, tourism expert, hotel-management. Research Center: applied research, studies, audits, analyses and consulting. Multimedia library open to professionals and the general public.