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Swiss Tourism in Figures

2000
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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 20.6 billion Swiss francs in 1998, 9.0 billion (or 44%) came from domestic tourism. Expenditure by foreign visitors in Switzerland added some 11.6 billion Swiss francs (3% of the Gross Domestic Product).

Total tourism revenue	1987	1992	1997	1998
		in billion Swiss francs		
From domestic tourists	6.6	8.5	9.1	9.1
From foreign tourists	8.6	11.5	11.5	11.6
Total	15.2	20.0	20.6	20.7
Tourism's share of Swiss Gross Domestic Product	5.9%	5.8%	5.5%	5.4%

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)]	1987	1992	1997	1998
		in billion Swiss francs		
1.Metal and machine industry	31.0	38.0	45.8	47.7
2.Chemical industry	14.6	21.3	29.6	31.3
3.Tourism (Tourism balance of payments)	*8.6*	*11.5*	*11.5*	*11.6*
4.Watchmaking industry	4.3	7.4	8.3	8.4
5.Textile industry	4.3	4.6	3.9	4.0

1) Excl. income from capital abroad and work abroad

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		
	1992	1997	1998	1992	1997	1998	1992	1997	1998
Business & vacation stays	6.5	6.7	6.7	7.2[1)]	8.6[1)]	8.4[1)]	0.8[1)]	-0.5[1)]	-0.3[1)]
Educational & medical stays	1.5	1.4	1.4						
Excursionists, transit visitors	2.2	2.2	2.3	1.1	1.0	1.1	1.1	1.2	1.2
Other tourism	0.5	0.5	0.4	0.4	0.5	0.4	0.1	0.0	0.0
Consumption expenditure of border-zone inhabitants	0.8	0.7	0.8	0.0	0.0	0.0	0.8	0.7	0.8
Total	11.5	11.5	11.6	8.7	10.1	9.9	2.8	1.4	1.7

1) incl. educational and medical stays

Hotel guests from abroad spend some 5.6 billion francs

Expenditure by foreign visitors staying overnight in tourist accommodation establishments totalled 6.7 billion francs in 1998, of which four fifths were spent by tourists staying in hotels.

Overnight tourists	Expenditure 1998 for: in millions of francs			
	lodging	meals	incidentals	total
in hotels	2802.1	1246.2	1537.5	5585.8
in vacation apartments	205.1	243.7	213.6	662.4
at camp grounds	22.4	47.8	41.3	111.5
in group accommodation	35.7	48.0	37.8	121.5
in youth hostels	9.4	9.0	4.1	22.5
with friends and relatives	*	*	*	178.5
Total	*	*	*	6682.2

Average expenditure of a foreign tourist per overnight stay in 1998

Overnight tourists	Expenditures 1998 for: in francs			
	lodging	meals	incidentals	total
in hotels	148	66	81	295
in vacation apartments	23	27	24	74
at camp grounds	11	24	21	56
in group accommodation	18	24	19	61
in youth hostels	23	22	10	55
with friends and relatives	*	*	*	31

Foreign guests in Switzerland spend money not only in hotels and restaurants, but also in other businesses. In 1998, for instance, they spent the following estimated amounts on:

Gasoline/Petrol	624 million Swiss francs	Crafts, souvenirs and	
Tobacco	188 million Swiss francs	postcards	107 million Swiss francs
Sweets	287 million Swiss francs	Taxi fares	73 million Swiss francs
Inland water transportation	21 million Swiss francs	Sights or points of interest	21 million Swiss francs

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						
1998	137 209	81 057	10 961	9773	101 791	239 000
1999	139 414[1)]	82 188	11 246	10 152	103 586	243 000
Construction industry						
1998	203 145	77 942	3969	10 944	92 855	296 000
1999	205 958[1)]	74 024	4495	10 523	89 042	295 000

1) provisional data

Once again more jobs in the catering trade

The number of employees in the catering trade has increased by 1.5 per cent compared with the same quarter in the previous year, i.e. from 223 100 to 226 500. The number of full-time jobs has increased by 1000. 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 has risen by 4800, at the same time the number of part-time staff with a work quota of less than 50 per cent has dropped by 2400.

Employees (4th quarter)

	4th quarter 98	4th quarter 99	Change absolute	Change %
Total full-time employees (90% and over)	164 000	165 000	+1000	+0.6%
Total part-time employees (50 to 89%)	21 600	26 400	+4800	+22.2%
Total part-time employees (<50%)	37 500	35 100	-2400	-6.4%
Total employees	223 100	226 500	+3400	+1.5%

Accommodation: Hotels and supplementary accommodation

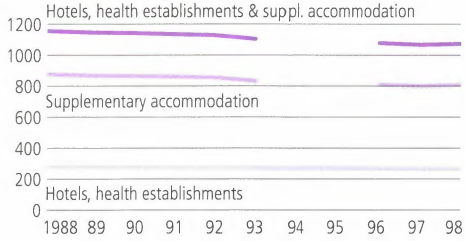
Outline of the accommodation sector

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

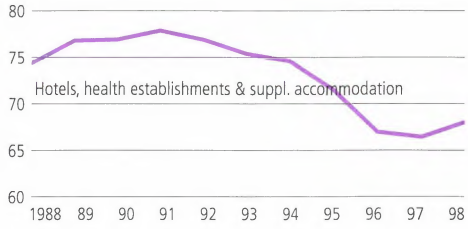
Hotel accommodation	= hotels, boarding houses, aparthotels, inns/ guesthouses, motels
Health establishments	= sanatoria, clinics, spas, convalescent homes, with medical or similar care
Supplementary accommodation	= chalets and apartments, private rooms, camping sites, group accommodation, youth hostels.

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.

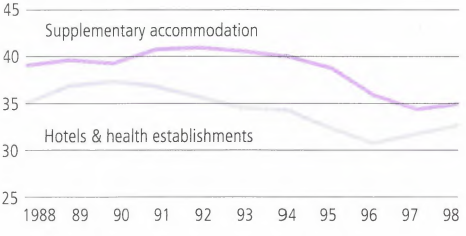
Beds (in thousands)



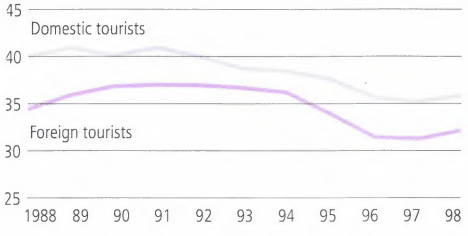
Total overnight stays (in millions)



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



Overnight stays of domestic and foreign tourists (in millions)



Swiss guests account for the lion's share

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

Country of residence	1991	1993	1997	1998	Winter[1] 1996/97	Summer[1] 1997	Winter[1] 1997/98	Summer[1] 1998
Switzerland	41.0	38.8	35.3	36.0	15.7	19.5	16.0	20.0
Total of foreign countries	37.0	36.7	31.3	32.2	14.0	17.2	14.5	17.7
Federal Republic of Germany	16.1	16.6	14.0	14.2	7.1	6.8	7.3	6.9
United Kingdom	2.6	2.4	1.9	2.2	0.8	1.1	0.9	1.2
France	2.5	2.3	1.8	1.8	0.9	0.9	0.9	0.9
Italy	2.0	1.7	1.2	1.4	0.5	0.7	0.6	0.8
Belgium	2.0	2.2	1.7	1.7	0.8	0.9	0.8	0.9
Netherlands	3.4	3.4	2.6	2.7	1.1	1.6	1.1	1.6
Nordic countries[2]	0.7	0.6	0.5	0.6	0.3	0.3	0.3	0.3
Spain	0.7	0.5	0.4	0.4	0.1	0.3	0.1	0.3
Austria	0.6	0.5	0.4	0.4	0.2	0.2	0.2	0.2
Other countries Europe	1.4	1.3	1.5	1.4	0.6	0.7	0.7	0.8
Europe total (excl. Switzerland)	32.0	31.5	26.0	26.8	12.4	13.5	12.9	13.9
United States	1.8	2.1	1.9	2.1	0.5	1.3	0.6	1.5
Canada	0.2	0.2	0.2	0.2	0.1	0.1	0.1	0.1
Brazil	0.1	0.1	0.2	0.1	0.1	0.1	0.1	0.1
Other countries America	0.3	0.2	0.2	0.3	0.0	0.2	0.0	0.2
America total	2.4	2.6	2.5	2.7	0.7	1.7	0.8	1.9
Japan	0.8	0.8	0.9	0.9	0.2	0.7	0.2	0.7
Israel	0.4	0.3	0.3	0.3	0.1	0.2	0.1	0.2
India	0.1	0.1	0.1	0.1	0.0	0.1	0.0	0.1
Other countries Asia	0.6	0.8	1.0	0.8	0.4	0.7	0.3	0.5
Asia total	1.9	2.0	2.3	2.1	0.7	1.7	0.6	1.5
Africa	0.5	0.4	0.3	0.3	0.1	0.2	0.1	0.2
Australia, Oceania	0.3	0.2	0.3	0.3	0.1	0.2	0.1	0.2
Other overseas countries	0.8	0.6	0.6	0.6	0.2	0.4	0.2	0.4
Total	78.0	75.5	66.6	68.2	29.7	36.7	30.5	37.7

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

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 1999, this figure had risen to 259500. 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 259500 beds

Year	Number of hotels	Number of beds	
		existing[1)]	available[1)]
1989	6800	270500	221600
1994	6200	264000	220900
1998	5900	259400	219400
1999	5800	259500	219600

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».

Small and medium-sized hotels predominate

1999		
Size of establishment	Number of establishments	
	in figures	in%
up to 20 beds	2294	39.4
21–50 beds	2019	34.7
51–100 beds	984	16.9
more than 100 beds	523	9.0
up to 10 rooms	2250	38.7
11–20 rooms	1442	24.8
21–50 rooms	1506	25.9
51–100 rooms	478	8.2
more than 100 rooms	143	2.4

Constant upgrading of hotels

Equipment of rooms				
Year	Rooms with running water		Rooms without running water	Total
	with bath/shower	without bath/shower		
1989	111400	33300	3400	148100
1994	118400	23200	2500	144100
1998	120600	18900	2300	141800
1999	121500	18000	2200	141700

In 12% of all hotels, an overnight stay costs less than Sfr. 50.–

Rate per person/night in Sfr.	Number of rooms			
	1989	1994	1998	1999
up to 49.99	50600	19900	16600	17200
50.– to 99.99	61900	57200	53800	53400
100.– to 149.99	}	36400	36700	36600
150.– and more	35600	30700	34700	34500

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	1299945	887753	2187698
50.– to 99.99	5418062	4966323	10384385
100.– to 149.99	3838342	5815070	9653412
150.– and more	3008700	6875340	9884040

Operating expenses in percent (1998)

Hotel category	*****	**+*
Direct costs	15.1	26.1
Gross income I	84.9	73.9
Personnel expenses	39.2	32.6
Gross earnings/pay	33.9	26.5
Social costs, personnel insurance, other personnel expenses	5.3	6.1
Gross income II	45.7	41.3
Operating expenses	16.4	11.4
Insurance	0.6	1.4
Utilities (Strom, Heizung, Wasser)	2.7	3.1
Marketing (incl. commissions)	5.2	2.2
Other operating expenses	7.9	4.7
Operating result I	29.3	29.9
Management costs	4.7	8.0
Operating result II	24.6	21.9
Financial and property expenses		
Maintenance and replacements	7.7	3.8
Gross operating profit	16.9	18.1
Property taxes and insurances	0.6	0.3
Rents	+2.5	+2.2
Rentals (incl. leasing)	2.6	1.0
Interests (incl. land rentals)	5.8	10.8
Operating cash flow	10.4	8.2
Extraord. income & expenditure	+2.3	+2.0
Cash flow	12.7	10.2
Depreciation and amortization	10.7	9.8
Net operating income	2.0	0.4

The Swiss Association for Hotel Credit publishes reliable annual statistics on 687 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)				
*	**	***	****	*****
29.9%	29.9%	30.2%	30.3%	29.3%

* Hotel categories

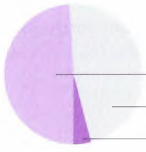
Operating result I is an important index for a hotel's economic evaluation. It is the result before deduction of expenses for maintenance, private cash withdrawals, wages, directors's salaries, administration, taxes, interest and depreciation. The Operating result obtained is often not sufficient to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

Shares of turnover according to hotel categories



* and **

Food & Beverage	67.0%
Accommodation	30.1%
Miscellaneous	2.9%



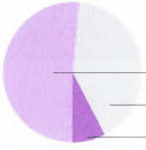
****

Food & Beverage	46.9%
Accommodation	49.0%
Miscellaneous	4.1%



***

Food & Beverage	56.2%
Accommodation	40.7%
Miscellaneous	3.1%



*****

Food & Beverage	40.9%
Accommodation	51.4%
Miscellaneous	7.7%

Hotel-Panel 1997

Purpose of the Hotel-Panel 1997

The first statistically representative Hotel-Panel 1997 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 1997 based on 170 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 Swiss Federal Statistical Office (BFS) and the Swiss Hotel Association (SHA). The analysis is performed on a yearly basis.

Comments

According to the collected data of the Hotel-Panel 1997 the Swiss hotel industry had a total turnover of approximately CHF 7.54 billion of which 3.04 billion or 40% fall to mere overnight accommodation. The hotel industry is an intensely service-oriented branch: the average staff expenditures amount to 34.2% of the total turnover.[1)] The profit amounts to 5.8% of the total revenue. The degree of immobilisation is considerable with fixed assets of 88.2% 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 5% (or approximately CHF 2 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 76 per guest staying overnight (not including value added tax and breakfast). The total turnover per employee accounts to CHF 100 000 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 40 000.

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 1997

Means	City	Montain	Lake	Switzerland (all regions)
Total turnover in 1000 CHF	6279	1351	1603	1490
Staff expenditures in 1000 CHF	2560	522	648	592
Staff expenditures in % of total turnover	35.0	31.2	36.2	34.2
Operating result I in % of total turnover	35.6	31.2	24.3	27.2
Cash flow in % of total turnover	19.9	17.1	11.0	13.9
Gain/Loss in % of total turnover	10.5	7.3	3.3	5.8
Fixed assets in % of total assets	89.4	89.7	94.2	88.2
Equity capital in % of total capital	22.7	15.2	0.2	5.0
Accommodation mean in CHF	149	80	65	76
Turnover per employee in 1000 CHF	125 094	102 392	102 741	100 617
Gross product per employee in CHF	76 380	61 788	61 765	59 978
Staff expenditures per employee in CHF City	51 959	39 002	43 662	40 383

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

The majority of hotel guests are from abroad

Overnight stays by country of residence of guests				
Country of residence	1989 millions	1994 millions	1998 millions	1999 millions
Switzerland	14.8	13.4	13.1	13.6
Total of foreign countries	20.5	19.7	18.7	18.5
Federal Republic of Germany	6.5	7.0	6.4	6.3
United Kingdom	1.9	1.6	1.6	1.8
France	1.6	1.3	1.1	1.1
Italy	1.3	1.0	1.0	0.9
Belgium	0.9	1.0	0.8	0.8
Netherlands	0.9	0.9	0.8	0.8
Nordic countries[1)]	0.5	0.4	0.4	0.4
Spain	0.4	0.4	0.3	0.3
Austria	0.4	0.4	0.3	0.3
Other countries Europe	0.8	0.9	1.2	1.0
Europe total (excl. Switzerland)	15.2	14.9	13.9	13.7
United States	2.2	1.9	1.9	1.9
Canada	0.2	0.2	0.2	0.2
Brazil	0.1	0.1	0.1	0.1
Other countries America	0.3	0.1	0.2	0.1
America total	2.8	2.3	2.4	2.3
Japan	0.8	0.9	0.9	0.9
Israel	0.3	0.3	0.2	0.2
India	0.1	0.1	0.1	0.2
Other countries Asia	0.7	0.8	0.7	0.7
Asia total	1.9	2.1	1.9	2.0
Africa	0.4	0.3	0.3	0.3
Australia, Oceania	0.2	0.1	0.2	0.2
Other overseas countries	0.6	0.4	0.5	0.5
Total	35.3	33.1	31.8	32.1

1) Denmark, Finland, Norway, Sweden and since 1.1.1994 Iceland

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	Supply		Overnight stays 1999 in millions			Occupancy in % of available...	
	Available rooms	Available beds	Swiss	Foreigners	Total	Rooms	Beds
Graubünden	17576	33625	2.7	3.0	5.7	50.4	46.6
Valais	13604	26520	1.7	2.2	3.9	43.2	40.3
Central Switzerland	13497	25140	1.3	2.1	3.4	42.5	36.3
Bernese Oberland	11388	21096	1.3	2.0	3.3	45.8	43.5
Zurich	10376	17446	0.9	2.4	3.3	66.7	51.4
Ticino	9881	19051	1.5	1.4	2.9	46.8	41.5
Vaud	9595	17806	0.9	1.5	2.4	46.2	37.0
Geneva	7964	13045	0.4	1.8	2.2	58.4	45.9
Swiss Mittelland	9022	15478	1.1	0.8	1.9	44.4	34.0
Eastern Switzerland	9273	16643	1.1	0.6	1.7	35.3	27.8
Basle-City/Basle-Country	3552	5727	0.3	0.5	0.8	52.1	40.4
Fribourg-Neuchâtel-Jura	4173	8008	0.4	0.2	0.6	28.6	21.0
Switzerland	119898	219585	13.6	18.5	32.1	47.2	40.1

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
1989	78100	47100	31600	64800	35	21	15	29
1994	79100	46300	29800	65700	36	21	13	30
1998	77600	45700	30100	66000	35	21	14	30
1999	77100	46300	30400	65800	35	21	14	30

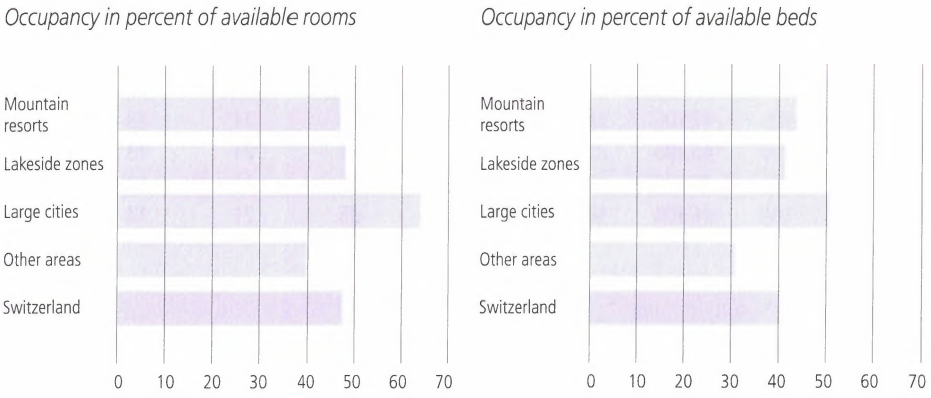
Hotel overnight stays in touristic areas

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
1989	13.4	7.8	6.2	7.9	38	22	18	22
1994	13.6	6.9	5.1	7.5	41	21	15	23
1998	12.4	6.8	5.4	7.1	39	22	17	22
1999	12.2	7.0	5.6	7.4	38	22	17	23

1999: Shares of domestic and foreign overnight stays in hotels vary according to the areas



Best occupancy in big cities



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)]
1989	34	47	37	45	53	54	30	33
1994	35	47	35	41	45	47	29	31
1998	33	44	35	41	48	49	27	30
1999	32	43	35	41	49	50	28	31

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

More overnight stays in summer than in winter



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*.

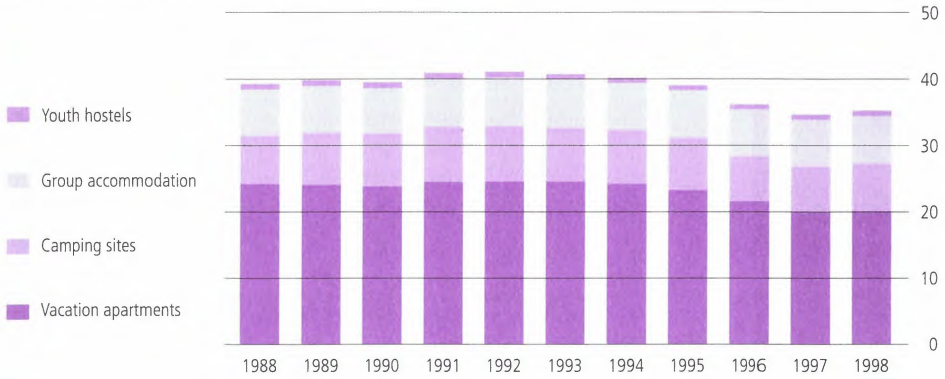
While the tourism statistics of camping sites, group accommodation and youth hostels are based on censuses conducted nationwide, the figures for vacation apartments refer to the Cantons of Berne, Obwalden, Graubünden, Ticino and Valais as well as to a selection of places in the Cantons of Appenzell Ausserrhoden, 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	1988		1993		1997		1998	
	Number	in %	Number	in %	Number	in %	Number	in %
Vacation apartments	360000[1)]	41	360000[1)]	43	360000[1)]	45	360000[1)]	45
Camping sites	272000	31	238000	29	208000	26	208000	26
Group accommodation	234000	27	226000	27	226000	28	231000	28
Youth hostels	8100	1	7300	1	6900	1	6800	1
Total	874100	100	831300	100	800900	100	805800	100

1) as per 1986 survey

Vacation apartments account for 57% of all overnight stays in supplementary accommodation establishments (in millions)



The majority of guests in supplementary accommodation are Swiss

Overnight stays in all types of supplementary accommodation				
Country of residence	1987/88[1] in millions	1992/93[1] in millions	1996/97[1] in millions	1997/98[1] in millions
Switzerland	24.3	24.2	21.6	22.0
Total of foreign countries	15.0	16.6	13.0	13.3
Federal Republic of Germany	8.3	9.3	7.6	7.6
United Kingdom	0.8	0.7	0.5	0.5
France	0.9	0.9	0.7	0.6
Italy	0.4	0.6	0.4	0.4
Belgium	1.0	1.1	0.9	0.9
Netherlands	2.1	2.5	1.8	1.9
Nordic countries[2]	0.2	0.2	0.1	0.2
Spain	0.2	0.2	0.1	0.1
Austria	0.1	0.2	0.1	0.1
Other countries Europe	0.3	0.3	0.3	0.4
Europe total (excl. Switzerland)	14.3	16.0	12.5	12.7
United States	0.2	0.2	0.2	0.2
Canada	0.0	0.0	0.0	0.0
Brazil	0.0	0.0	0.0	0.0
Other countries America	0.1	0.1	0.1	0.1
America total	0.3	0.3	0.3	0.3
Japan	0.0	0.0	0.0	0.0
Israel	0.1	0.1	0.1	0.1
India	0.0	0.0	0.0	0.0
Other countries Asia	0.1	0.1	0.1	0.1
Asia total	0.2	0.2	0.2	0.2
Africa	0.1	0.0	0.0	0.0
Australia, Oceania	0.1	0.1	0.1	0.1
Other overseas countries	0.2	0.1	0.1	0.1
Total	39.3	40.8	34.6	35.3

1) November–October
2) Denmark, Finland, Norway, Sweden and since 1.1.1994 Iceland

Mainly Swiss and Germans in all types of supplementary accommodation

Country of residence	Overnight stays by type of supplementary accommodation 1997/98[1]				
	Vacation apartments	Camping sites	Group accommod.	Youth hostels	Total
Switzerland	11144997	5246865	5123381	417638	21932881
Total of foreign countries	8905000	1961780	2003647	407636	13278063
Fed. Rep. of Germany	5639698	850610	954413	129847	7574568
Netherlands	1163858	612394	64340	9899	1850491
Belgium	526982	47185	290158	6042	870367
France	396668	71594	155443	16730	640435
United Kingdom	286393	108282	108144	20751	523570
Italy	258668	85162	67228	12524	423582
United States	92370	10895	87378	33384	224027
Austria	64328	23038	22430	5117	114913
Spain	39031	33382	16927	10191	99531
Australia/Oceania	10916	14870	31258	27118	84162
Luxembourg	43496	4006	16065	935	64502
Other foreign countries	382592	100362	189863	135098	807915
Total	20049997	7208645	7127028	825274	35210944

1) November–October

More overnight stays in supplementary accommodation during the summer season

Winter	46%	Summer	54%

Types of accommodation	Overnight stays in supplementary accommodation	
	Winter Nov. 1997–April 1998 in millions	Summer May–Oct. 1998 in millions
Vacation apartments	12.0	8.0
Camping sites	0.8	6.4
Group accommodation	3.2	3.9
Youth hostels	0.3	0.6
Total	16.3	18.9

Catering trade

The Swiss catering trade – the hotels and restaurants business – is an important sector of the economy: dynamic and innovative.

The guest is always the centre of attention – the opening times, but also the range are increasingly aimed to meet market requirements. The guest is spoiled and courted: Live with pleasure and enjoy is the motto. 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).

The catering trade is an important currency earner («invisible» export).

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

There is a restaurant for every 250 inhabitants.

The extremely high density of catering establishments does not only bring advantages. It also brings hard competition which, admittedly, means an enormous challenge and an incentive to improve performance.

The catering trade – hotels and restaurants – achieves a total annual turnover of approx. 23 billion Swiss francs.

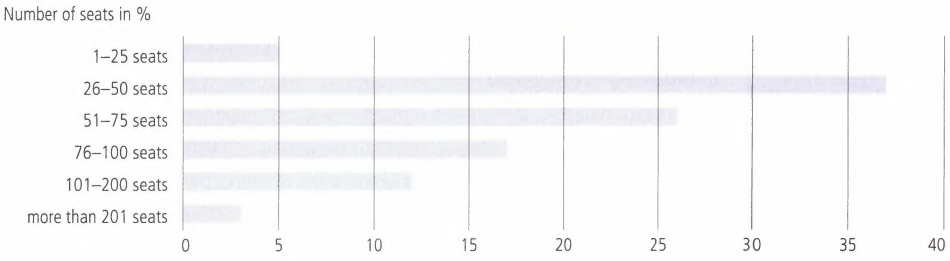
The catering trade is one of the most important employers providing some 226000 jobs; the total wage bill was estimated at well over 9 billion Swiss francs.

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

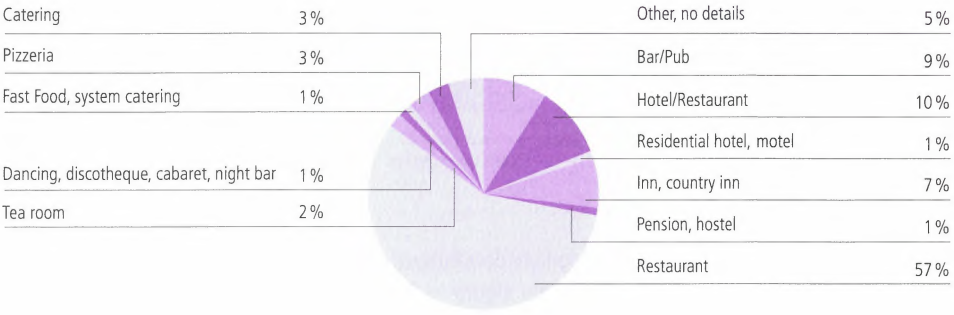
In the catering trade, the trend to the slimming down of services, to increasing added value is clearly recognisable – a proof that the branch is facing up to the future with the will to perform and professionalism, but also with dynamism and innovation.

Source: Erhebungen GastroSuisse, Branchenspiegel 2000

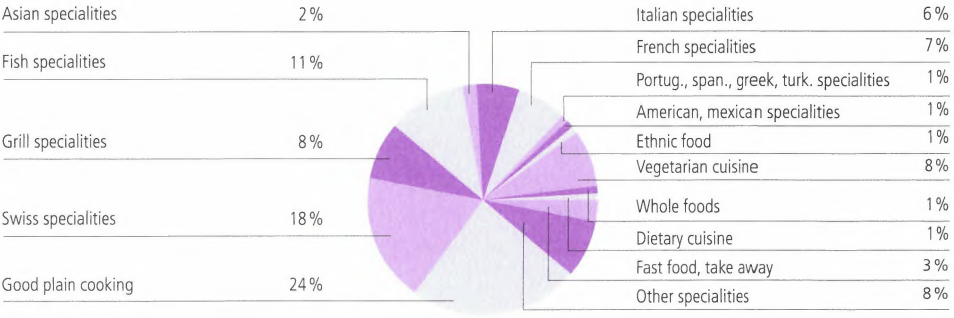
Business size: number of seats per restaurant



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

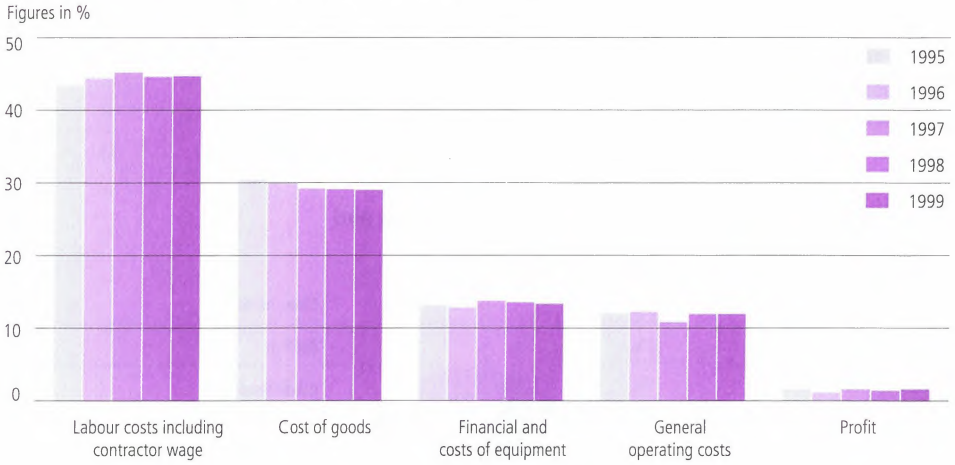


The offer of «good plain cooking» and Swiss specialities still most popular



Catering trade – growing labour costs ratio in the development of costs

The costs structure since 1995 (on average of all the restaurants participating in the survey)



A look at the long-term development of the costs structure shows that the labour costs ratio rose again slightly in 1999. The labour costs increased very slightly (+0.1%). The ratio of the cost of goods remained practically unchanged at some 29% (-0.1%). The cost of goods accounts today on average for less than one third of the selling price. This fact is too little known to many guests. They therefore wrongly criticise the pricing because they mistakenly regard the difference between the selling price and the cost of goods as the catering entrepreneur's «earnings». They still do not include the far more important labour costs in their assessment.

Transport

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.

Over 28 million air travellers

- At the three intercontinental airports of Zurich, Geneva and Basle, 505121 take-offs and landings with approx. 31.6 million passengers were registered in 1999, some 89% of whom used regular scheduled airlines.
- Approx. 11% of visitors to Switzerland arrive by plane.
- 59% of passengers at Swiss airports travel on Swiss airlines.
- At the beginning of 1999, Swissair's network comprised approx. 487991 km with 140 destinations in 76 countries.

The Postal Coach as distributor

- 16 postal coach regional centres are partners for transport services provided on order as well as suppliers of information to individual travellers.
- 685 postal coach routes result in a total route network of 8500 km (2.5 times the length of the federal railway network).
- 2435 postal coach drivers transported 91.44 million passengers in 1805 coaches (69000 seats), thereby covering an average of 213000 km each day or 77.99 million km in total.

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

Increasing supply and demand for tourism transport facilities

- There are 1821 tourism transport facilities in Switzerland: 13 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 1995

	Summer millions	Winter millions	Total millions	%
Cog-wheel trains	9.1	9.2	18.3	6
Funiculars	9.0	9.9	18.9	6
Aerial cable cars	19.0	123.2	142.2	47
Skilifts		124.9	124.9	41
Total	37.1 (12%)	267.2 (88%)	304.3	100

Proceeds from passenger traffic 1995				
	Summer millions	Winter millions	Total millions	%
Cog-wheel trains	72.6	41.0	113.6	13
Funiculars	21.6	38.2	59.8	7
Aerial cable cars	103.2	378.5	481.7	54
Skilifts		228.9	228.9	26
Total	197.4 (22%)	686.6 (78%)	884.0	100

Private transport

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

Germans top the list

Motor vehicles entering Switzerland from abroad (in thousands)			
	Cars and motorcycles (holiday traffic)		
	1989	1994	1999[1)]
Fed. Republic of Germany	16633	19454	20349
France	10324	11602	13233
Italy	15188	12044	14720
Austria	3272	3525	3424
Other foreign countries	2634	2425	2468
Total	48051	49050	54194

1) New method of survey since 1995

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

	1997/98	1998/99	Change in %
Berne	217685	202035	-7.19
Grisons	751859	713660	-5.08
Eastern Switzerland	104056	93144	-10.49
Vaud	175828	191604	+8.97
Valais	741838	696866	-6.06
Western Switzerland	28194	36018	+27.75
Central Switzerland	137749	125729	-8.73
Ticino	31966	23125	-27.66
SkiSwiss			-3.56
Total	2189175	2082179	-4.98

1) A half-day lesson corresponds to two hours

Cycleland Switzerland

The second season was also a resounding success for Cycleland Switzerland: 3.3 million cyclists rode 140 million kilometres. About 100000 cyclists travelled along the route network for several days and generated some 330000 overnight stays. Services and goods for a total value of 140 million francs were consumed. Cycle tourists spent 140 francs and day excursionists 25 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
203000	57000	23000	4000	10000	15000	17000	329000

Table: Annual number of overnight stays of all cycle tourists on the national routes

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.

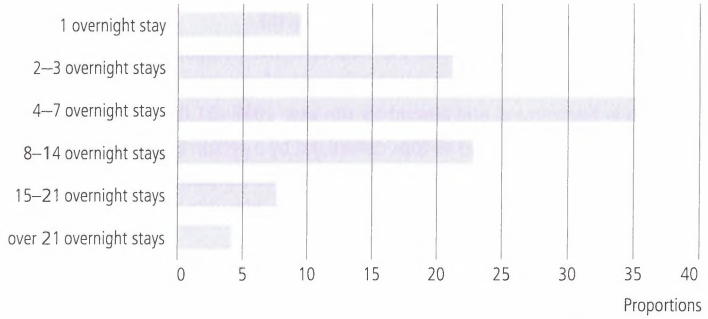
Net travel intensity for trips of 3+ overnight stays in comparison

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

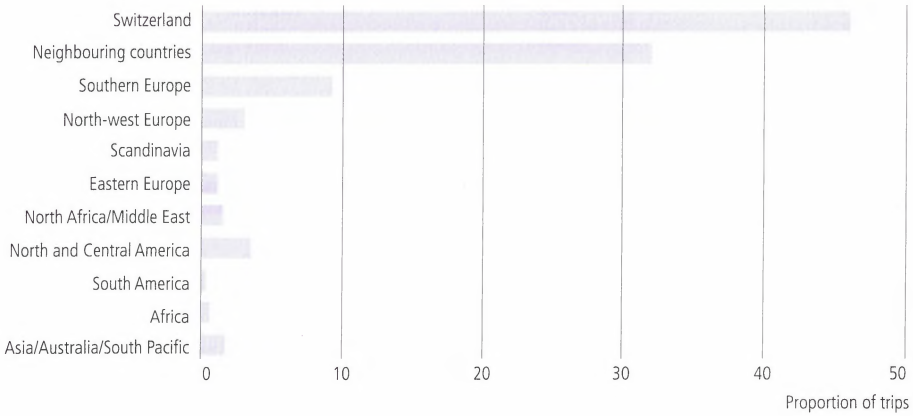
Key data for travel with at least 1 overnight stay

Key figures	1995/96	1999
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

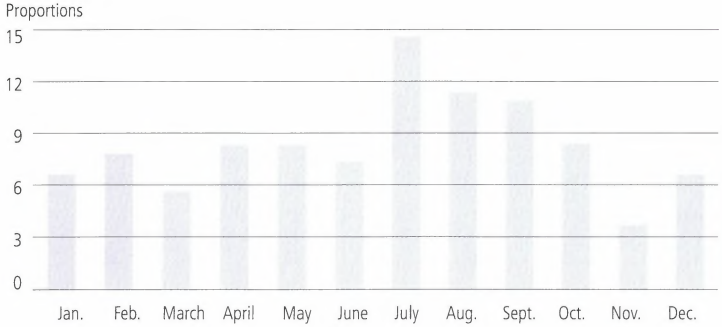
Duration of the trips: The trend towards shorter trips continues unabated. That time clearly appears to be in ever shorter supply is expressed in the fact that those taking a trip travel less often than before. Not only that, the number of those persons travelling more than once is again declining slightly.



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. In contrast Australia/New Zealand/the Pacific: The impression that these destinations are growing in popularity is not deceptive: 1.7% of all trips in 1998 were to this area – a previously unequalled proportion.



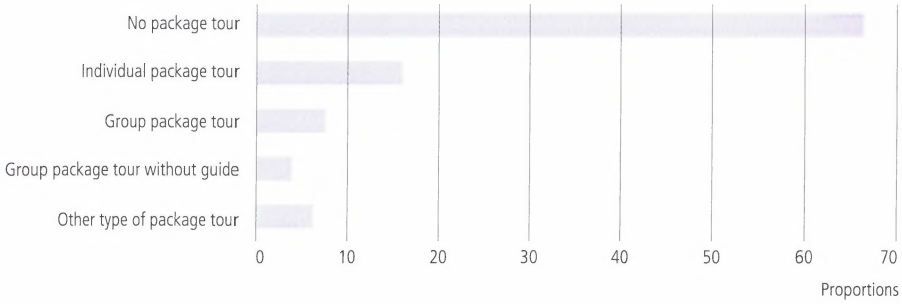
Travelling times: the months of July/August/September are the favourites among the Swiss: in 1998, 37% of all trips began in the summer months. In the other months no particular peaks are discernible, with the exception of November in which the lowest number of trips is started: in July (the peak month)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



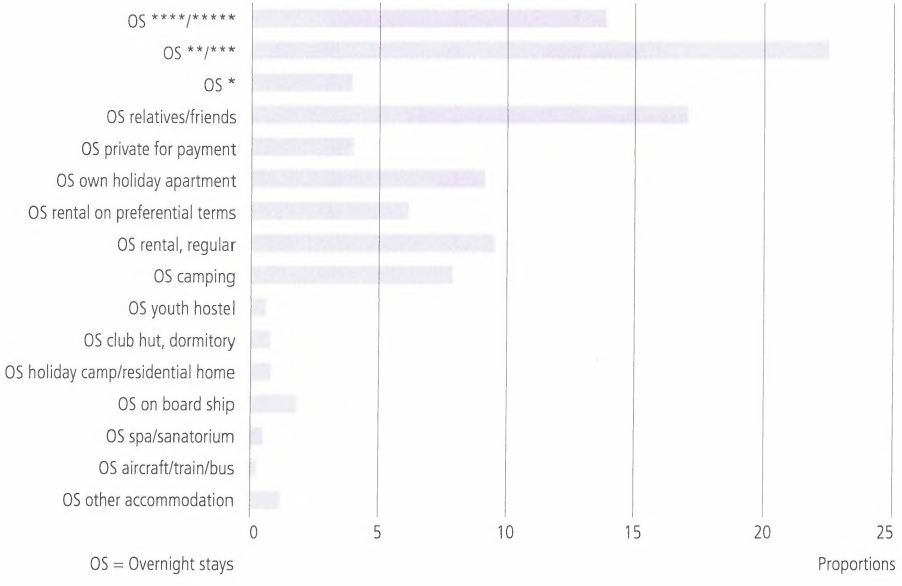
Type of travel: 20% of all trips fall under the heading «Visiting relatives/friends», 15% under «Beach/lakeside holidays».



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.



Swiss tourism in the international context

Volume and revenue shares of international tourism

In 1999, 662.9 million tourist arrivals were reported worldwide generating revenue to the tune of US $ 439.4 billion (Source: WTO, May 2000).

Region	Arrivals 1999 in millions	in %	Income 1998 in billion US $	in %
1. Europe	392.5	59.2	232.5	52.7
2. America	122.9	18.5	118.0	26.8
3. East Asia/Pacific	97.2	14.7	67.8	15.4
4. Africa	26.9	4.1	9.9	2.2
5. Middle East/South Asia	23.4	3.5	12.8	2.9
Total	662.9	100.0	441.0	100.0

Switzerland's share of worldwide revenue from international tourism is approx. 2%.

GDP share of international tourism in 1998 (OECD members)

1. Czech Repulic	6.6%	7. Greece	4.3%
2. Hungary	5.3%	8. Turkey	3.9%
3. Austria	5.3%	9. Ireland	3.8%
4. Spain	5.1%	10. New Zealand	3.3%
5. Poland	5.1%	11. Switzerland	3.0%
6. Portugal	4.5%	12. Iceland	2.8%

Source: IMF (GDP) – WTO (receipts) – May 2000

Volume and revenue share worldwide

In 1999, the position of Swiss tourism compared with other countries in regard to arrivals and revenue was as follows (Source: WTO, May 2000):

1999	Arrivals			Revenue		
Destination	in millions	in %	rank	in billion US $	in %	rank
France	73.0	11.0	1.	31.7	7.0	3.
Spain	51.8	7.8	2.	32.9	7.3	2.
United States	48.5	7.3	3.	74.4	16.4	1.
Italy	36.1	5.5	4.	28.4	6.3	4.
China	27.0	4.1	5.	14.1	3.1	7.
United Kingdom	25.7	3.9	6.	21.0	4.6	5.
Canada	19.6	3.0	7.	10.0	2.2	9.
Mexico	19.2	2.9	8.	7.6	1.7	11.
Russia	18.5	2.8	9.	7.8	1.7	10.
Poland	17.9	2.7	10.	6.1	1.3	14.
Austria	17.5	2.6	11.	11.1	2.4	8.
Fed. Rep. of Germany	17.1	2.6	12.	16.8	3.7	6.
Czech Republic	16.0	2.4	13.	3.0	0.7	16.
Hungary	12.9	1.9	14.	3.4	0.8	15.
Greece	12.0	1.8	15.	7.2	1.6	13.
Schwitzerland	10.8	1.6	16.	7.4	1.6	12.
Other foreign countries	239.3	36.1		170.5	37.6	
Total	662.9	100.0		453.4	100.0	

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: STV, 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.veloland.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, CH-8046 Zurich, phone +41 (0)1 377 51 11, fax +41 (0)1 371 89 09. E-mail: info@gastrosuisse.ch, home page: Homepage: www.gastrosuisse.ch. Established: 1891. Leading 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.
- 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 pro-fessionals.
- Swiss Association of Official Tourist Office Managers, P.O.Box 824, 8038 Zurich, phone +41 (0)1 481 04 69. fax +41 (0)1 480 15 95. 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 ma-nagers.
- Swiss Association of coffeehouse-holder (SCV), Bleicherweg 54, 8039 Zurich, phone +41 (0)1 201 67 77, fax +41 (01) 201 68 77. Established in 1938. Objectives: Representation of the professional interests of café proprie-tors 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, coordination of marketing activities, issuing of common tariffs and 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, Oberdorfstr. 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 (Reka).
- Swiss Hotel Association (SHA), Monbijoustrasse 130, P.O. Box, CH-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 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 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. 16 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. 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: Promotion 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. Internet: www.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, c/o IMAT, Viale S.Franscini 32, 6500 Bellinzona, phone +41 (0)91 821 60 24, fax +41 (0)91 821 60 11. E-mail: tourex@usa.net. Internet : www.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. Homepage: www.tcs.ch. Established in 1896. Objectives: To safeguard the interests of the motorist, le-gal 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.
- Union Helvetia, Swiss Central Federation of Hotel and Restaurant Employees, Adligenswilerstrasse 22, P.O. Box 4870, 6002 Lucerne, phone +41 (0)41 418 22 22, fax +41 (0)41 412 03 72. E-mail: info@union-helvetia.ch. Internet: www.union-helvetia.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. Commitment to attractive, secure employment in Swiss tourism.

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. Homepage: www.MySwitzerland.com. E-Mail: info@switzerlandtourism.ch. 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, 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. 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 ba-lance 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

- 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.
- 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. 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.
- Institut für Tourismuswirtschaft ITW an der Hochschule für Wirtschaft Luzern, Zentralstrasse 9, 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, Tel. 01 440 30 90, Fax 01 271 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, Tel. 091 821 60 10, Fax 091 821 60 19. E-Mail: info-ssat@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.
- University of Berne Research Institute for Leisure and Tourism (FIF), Engehaldenstr. 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 de 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.

Sources

Cycling in Switzerland (pages 28)
Federal Aliens Office (page 7)
Federal Office for Civil Aviation (page 25)
Federal Statistical Office (pages 3–5, 7–11, 15–21, 26, 27, 33, 34)
GastroSuisse (pages 7, 22–24)
Institute for public services and tourism at the University of St. Gall (pages 29–32)
National Road Federation (page 27)
State Secretariat for Economic Affairs (page 6)
Swiss Cableways (pages 25, 26)
Swiss Federal Railways (page 25)
Swiss Hotel Association (page 13, 14)
Swiss Association for Hotel Credit (pages 12, 13)
Swiss Postbus (page 25)
Swiss Ski and Snowboard School (page 28)