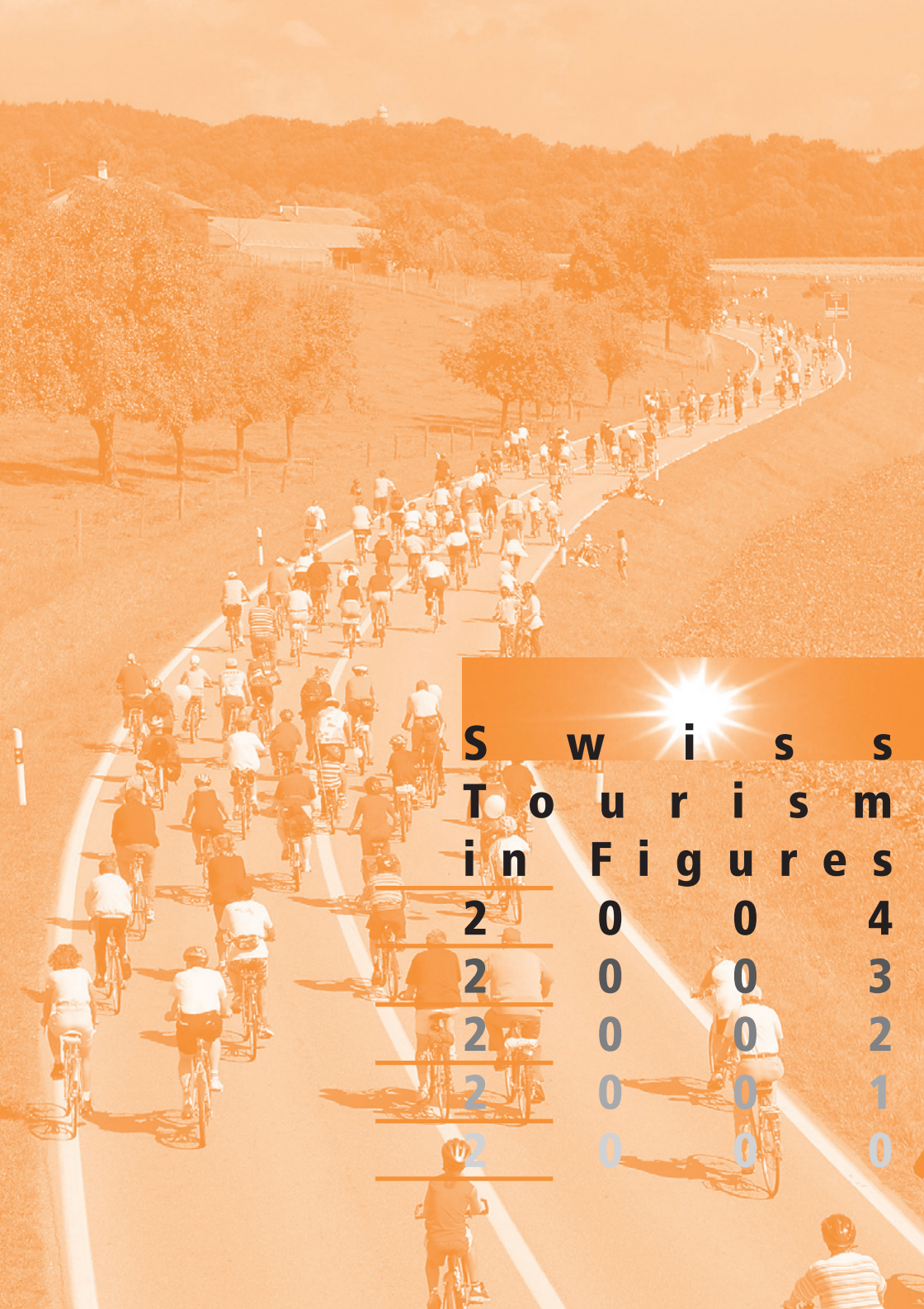


Swiss Tourism in Figures

2004

2003

2002

2001

2000

Contents

Tourism – an important sector of the economy 3
Accommodation: Hotels and supplementary accommodation 9
Accommodation: Hotels 11
Accommodation: Supplementary accommodation 20
The hotel and catering industry 23
Transport 28
Sports 31
Quality label for the Swiss tourism industry 32
Swiss tourism in the international context 33
Tourism Associations and Institutes 35

The results of the survey of the Swiss tourist market were published in the 2002 issue of the brochure (www.swisstourfed.ch).

Edited by

- Federal Statistical Office (FSO)
- GastroSuisse
- hotelleriesuisse
- Swiss Tourism Federation (STF)
- Switzerland Tourism (ST)

The data in this publication are based on 2003 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: Copyright slowUp/Switzerland Tourism (slowUp Lake Murten 2001)

Berne, July 2004

Tourism – an important sector of the economy

Tourism generates income

Domestic and international tourism are important factors in the Swiss economy. Of a total revenue of CHF 22.2 billion in 2003, 9.6 billion (or 43%) came from domestic tourism. Expenditure by foreign visitors in Switzerland added some CHF 12.6 billion (3% of the Gross Domestic Product).

Total tourism revenue	1992	2001	2002	2003
		in billion CHF		
From domestic tourists	8.5	9.7	9.7	9.6
From foreign tourists	11.5	12.7	12.3	12.6
Total	20.0	22.4	22.0	22.2
Tourism's share of Swiss Gross Domestic Product	5.8%	5.4%	5.1%	5.2%

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)]	1992	2001	2002	2003
		in billion CHF		
1.Metal and machine industry	38.0	54.9	50.3	50.4
2.Chemical industry	21.3	41.8	44.8	45.0
3.Tourism (Tourism balance of payments)	*11.5*	*12.7*	*12.3*	*12.6*
4.Watchmaking industry	7.4	10.7	10.6	10.2
5.Textile industry	4.6	3.9	3.7	3.8

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

Overnight tourists account for 64% 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 CHF			in billion CHF			in billion CHF		
	2001	2002	2003	2001	2002	2003	2001	2002	2003
Business & vacation stays	7.1	6.5	6.2	9.0[1)]	8.9[1)]	8.6[1)]	–0.2[1)]	–0.6[1)]	–0.5[1)]
Educational & medical stays	1.7	1.8	1.9						
Excursionists, transit visitors[2)]	2.6	2.9	2.9	1.1	1.4	1.5	1.5	1.5	1.4
Other tourism	0.4	2)	2)	0.4	2)	2)	0.0	2)	2)
Consumption expenditure of border-zone inhabitants	1.0	1.1	1.6	0.0	0.0	0.0	1.0	1.1	1.6
Total	12.7	12.3	12.6	10.5	10.3	10.1	2.2	2.0	2.5

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

Hotel guests from abroad spend some CHF 5.2 billion

Expenditure by foreign visitors staying overnight in tourist accommodation establishments totalled CHF 6.2 billion in 2003, of which four fifths were spent by tourists staying in hotels.

Overnight tourists	Expenditure 2003 in million CHF for:			
	lodging	meals	incidentals	total
in hotels	2453.5	1241.8	1482.7	5178.0
in vacation apartments	177.7	215.2	188.5	581.4
at camp grounds	22.8	44.9	38.9	106.6
in group accommodation	38.6	50.0	39.3	127.9
in youth hostels	9.6	8.4	3.7	21.7
with friends and relatives				165.7
Total				6181.3

Source: Federal Statistical Office

Average expenditure of a foreign tourist per overnight stay

Overnight tourists	Expenditures 2003 in CHF for:			
	lodging	meals	incidentals	total
in hotels	143	72	86	301
in vacation apartments	24	29	26	79
at camp grounds	13	26	22	61
in group accommodation	20	26	20	66
in youth hostels	28	25	11	63
with friends and relatives				33

Source: Federal Statistical Office

Foreign guests in Switzerland spend money not only in hotels and restaurants, but also in other businesses. In 2003, for instance, they spent the following estimated amounts on:

Gasoline/Petrol	CHF 666 million
Tobacco	CHF 166 million
Sweets	CHF 238 million
Inland water transportation	CHF 22 million
Crafts, souvenirs and postcards	CHF 77 million
Taxi fares	CHF 81 million
Sights or points of interest	CHF 21 million

Source: Federal Statistical Office

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

Tourism and the Swiss economy

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

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

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

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

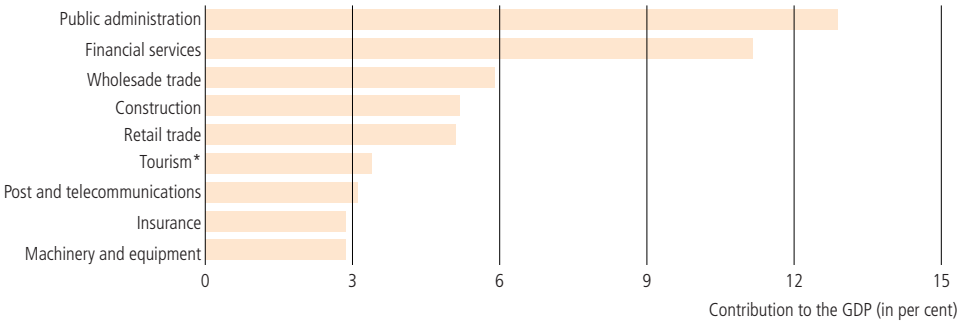
One of the most important branches of the Swiss economy

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

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

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

Contribution of tourism to the GDP in 1998



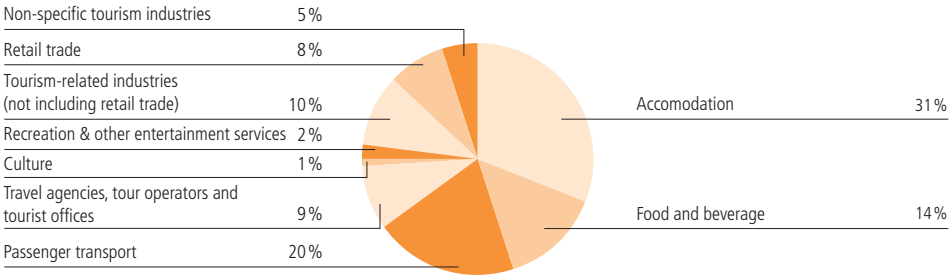
* direct effects

Source: TSA, Swiss Federal Statistical Office, 2003

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

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

Contribution of economic sectors to added value in 1998



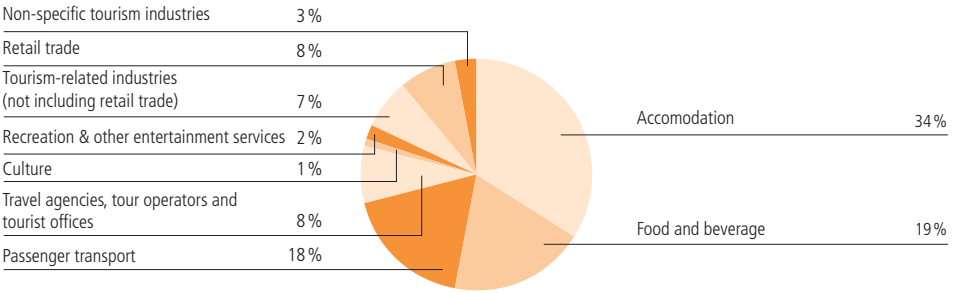
Direct tourism gross value added in Switzerland: CHF 12900 million (= 3.4% of GDP)

Source: TSA, Swiss Federal Statistical Office, 2003

Tourism creates jobs

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

166 000 jobs directly generated by tourism in Switzerland in 1998



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

Source: TSA, Swiss Federal Statistical Office, 2003

Foreign tourists accounted for 47% of tourist expenditure in 1998

	million CHF	%
Tourism consultation	30 610	100
International visitors	14 500	47
Same-day visitor	3120	10
Tourists (overnight visitors)	11 380	37
Domestic visitor	9790	32
Same-day visitor	4890	16
Tourists (overnight visitors)	4900	16
Domestic business trips	1790	6
Use of second homes on own account or free of charge	690	2
Other components	3840	13

Accommodation: Hotels and supplementary accommodation

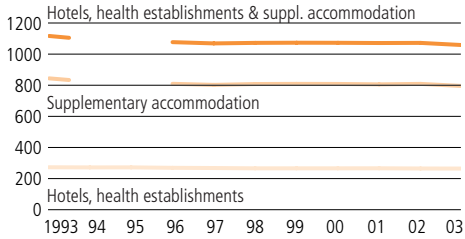
Overview of the accommodation sector

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

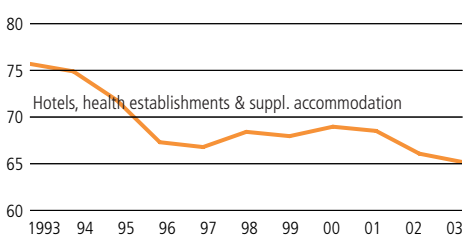
Hotel accommodation	= hotels, boarding houses, aparthotels, inns/ guesthouses, motels
Health establishments	= sanatoria, clinics, spas, convalescent homes, with medical or similar care
Supplementary accommodation	= chalets and apartments, private rooms, camping sites, group accommodation, youth hostels.

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

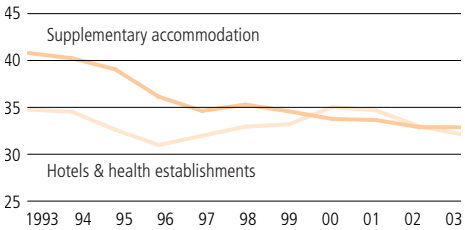
Beds (in thousands)



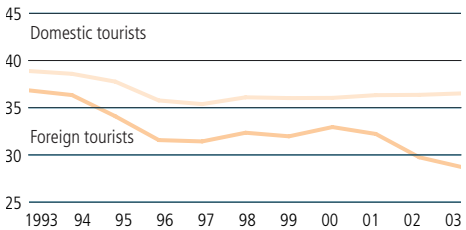
Total overnight stays (in millions)



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



Overnight stays of domestic and foreign tourists (in millions)



Source: Federal Statistical Office

Swiss guests account for the lion's share

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

Country of residence	1992	2001	2002	2003	Winter[1] 2001/02	Summer[1] 2002	Winter[1] 2002/03	Summer[1] 2003
Switzerland	40.0	36.1	36.3	36.4	16.3	19.9	16.4	20.0
Total of foreign countries	37.0	32.1	29.6	28.6	13.9	15.7	13.6	15.0
Germany	16.0	13.3	12.0	11.5	6.4	5.7	6.0	5.4
United Kingdom	2.6	2.6	2.4	2.4	1.2	1.2	1.2	1.2
France	2.3	1.9	1.8	1.8	0.9	0.9	0.9	0.9
Italy	2.0	1.4	1.4	1.4	0.6	0.8	0.6	0.8
Belgium	2.1	1.6	1.5	1.4	0.7	0.7	0.8	0.7
Netherlands	3.4	2.8	2.5	2.4	1.1	1.4	1.1	1.4
Nordic countries[2]	0.7	0.6	0.5	0.5	0.3	0.2	0.3	0.3
Russia, Federation[3]	...	0.2	0.3	0.3	0.1	0.1	0.2	0.1
Spain	0.6	0.4	0.4	0.4	0.1	0.2	0.1	0.2
Austria	0.5	0.4	0.4	0.4	0.2	0.3	0.2	0.2
Other countries Europe	1.4	1.3	1.3	1.4	0.7	0.7	0.6	0.7
Europe total (excl. Switzerland)	31.6	26.5	24.5	23.9	12.3	12.2	12.0	11.9
United States	2.1	2.1	1.8	1.6	0.6	1.2	0.6	1.0
Canada	0.2	0.2	0.2	0.2	0.1	0.1	0.1	0.1
Brazil	0.1	0.1	0.1	0.1	0.1	0.1	0.0	0.1
Other countries America	0.3	0.3	0.2	0.2	0.0	0.1	0.1	0.1
America total	2.7	2.7	2.3	2.1	0.8	1.5	0.8	1.3
Japan	0.8	0.9	0.7	0.6	0.1	0.6	0.1	0.5
Israel	0.3	0.3	0.2	0.2	0.1	0.2	0.1	0.1
India	0.1	0.2	0.2	0.2	0.0	0.2	0.1	0.2
Other countries Asia	0.8	0.9	1.1	1.0	0.4	0.6	0.3	0.6
Asia total	2.0	2.3	2.2	2.0	0.6	1.6	0.6	1.4
Africa	0.4	0.3	0.3	0.3	0.1	0.2	0.2	0.2
Australia, Oceania	0.3	0.3	0.2	0.2	0.1	0.2	0.1	0.2
Other overseas countries	0.7	0.6	0.5	0.5	0.2	0.4	0.3	0.4
Total	77.0	68.2	65.8	64.9	30.2	35.6	30.0	35.1

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

Accommodation: Hotels

The hotel industry is the major factor in Switzerland's tourism industry. As early as 1912 – prior to the outbreak of World War I – there were 211 000 hotel beds in Switzerland, and by 2003 this figure had risen to 258 700. The number has not significantly changed in recent years, but quality has been adapted to the changing demands of tourism.
In the statistics, data for hotels and health establishments are sometimes listed separately. To simplify matters, the figures on the following pages include hotel accomodation only.

5600 hotels with 258 700 beds

Year	Number of hotels	Number of beds	
		existing [1]	available [1]
1992	6300	261 900	222 700
2001	5700	260 100	220 100
2002	5600	259 000	218 500
2003	5600	258 700	220 800

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

2003				
Size of establishment	Number of establishments			
	in figures	cumulated	in %	cumulated
up to 20 beds	2154	2154	38.5	38.5
21–50 beds	1929	4083	34.4	72.9
51–100 beds	987	5070	17.6	90.5
more than 100 beds	530	5600	9.5	100.0
up to 10 rooms	2100	2100	37.5	37.5
11–20 rooms	1409	3509	25.2	62.7
21–50 rooms	1449	4958	25.9	88.5
51–100 rooms	479	5437	8.6	97.1
more than 100 rooms	163	5600	2.9	100.0

Source: Federal Statistical Office

Constant upgrading of hotels

Equipment of rooms				
Year	Rooms with running water		Rooms without running water	Total
	with bath/shower	without bath/shower		
1992	115400	26200	2700	144300
2001	123100	16500	2200	141800
2002	123000	15500	2100	140600
2003	123600	14800	2100	140500

Source: Federal Statistical Office

In 61% of all hotels, an overnight stay costs between CHF 50 and 150

Rate per person/night in CHF	Number of rooms			
	1992	2001	2002	2003
up to 49.99	27700	18400	19000	20100
50 to 99.99	62300	51500	50500	50000
100 to 149.99	54400	36000	35800	35800
150 and more		34700	34700	34600

Source: Federal Statistical Office

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

Rate per person/night in CHF	Overnight stays Swiss	Overnight stays Foreigners	Overnight stays Total
up to 49.99	1918685	1450789	3369474
50 to 99.99	5500462	4213848	9714310
100 to 149.99	3966301	5103166	9069467
150 and more	2850639	6196367	9047006

Source: Federal Statistical Office

Allocation of turnover and operating expenses in percent (2002)

The Swiss Association for Hotel Credit (SGH) publishes reliable annual average figures on over 477 establishments in Switzerland. The figures published on this page are based on these surveys and show average values. There are, of course, considerable differences between seasonal and year-round establishments and between mountain and lakeside hotels. Following a period of continuous growth in the number of overnight stays and the results in the years 1997 to 2000, a decline set in since the year 2001. Further details are available on request from the SGH.

Hotel category	*****	****	***	** + *
	%	%	%	%
Earnings on food and beverages	44.3	46.3	57.6	70.9
Earnings on accommodation	49.4	50.5	41.0	28.0
Earnings on other services	6.4	3.2	1.4	1.1
Total turnover	100.0	100.0	100.0	100.0
Expenditure on goods (incl. services)	15.8	18.4	22.1	26.0
Gross profit I	84.2	81.6	77.9	74.0
Personnel expenses	40.1	40.7	36.6	31.5
Gross profit II	44.1	40.9	41.3	42.5
Operating expenses	16.8	15.3	13.4	13.1
Operating result I	27.3	25.5	27.9	29.4
Management expenses	4.5	5.6	7.3	9.3
Operating result II	22.8	20.0	20.6	20.1
Maintenance	6.4	5.1	4.1	3.9
Gross operating profit	16.4	14.9	16.5	16.1
Financial and investment expenses	4.9	9.5	9.5	9.7
Operating cash flow	11.5	5.4	7.0	6.4
Non-recurring earnings and expenses	+0.2	+1.3	+1.7	+1.6
Corporate cash flow	11.8	6.7	8.7	8.0
Depreciation	10.2	9.4	9.0	10.3
Corporate result	1.6	–2.7	–0.3	–2.3

Level of indebtedness in the hotel trade in percent

Hotel category	*****	****	***	** + *
	%	%	%	%
Level of self-financing	27.5	10.5	7.3	6.1
Level of indebtedness	72.5	89.5	92.7	94.0

Source pages 13–14: Swiss Association for Hotel Credit (Statistical Year 2002)

Important key figures according to hotel category

Hotel category	*****	****	***	** + *
Profit and loss account				
Average number of beds	234	101	60	45
Bed occupancy rate on days when open (in %)	51.8	57.2	48.6	30.8
Average duration of stay (days)	3.5	3.3	3.3	2.6
	CHF	CHF	CHF	CHF
Average accommodation rate	225	111	82	69
Accommodation earnings per bed	34742	18522	11286	5816
Average operating income	17089835	3752817	1686813	897195
Balance sheet	CHF	CHF	CHF	CHF
Indebtedness per bed	112313	87036	62148	53434
Investment per bed	146614	91545	64478	54119
Investment per room	275763	169216	122455	108792
Average balance sheet total	39981106	9313839	3934223	2125002

Hotel-Panel 2001

Meaning and purpose of the Hotel Panel

The Hotel Panel is a joint project of the Swiss Association for Hotel Credit (SGH), the Federal Statistical Office (FSO) and the Swiss Hotel Association (SHA) which is repeated each year. For the Hotel Panel 2001, the Federal Statistical Office conducted a random survey of 185 establishments from among all Swiss hotels which provides statistically representative results and allows well-based statements for the Swiss hotel trade as a whole. These hotel-specific structure key figures are also included in the value added statistics within the framework of the national accounts.

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

Comments on the Hotel Panel figures for 2001

According to the extrapolated Hotel Panel data for 2001, the Swiss hotel industry had a total turnover of some CHF 8.6 billion in 2001, of which CHF 3.6 billion or 41.5 percent are attributable purely to overnight accommodation. Taking Switzerland as a whole, the Swiss hotel industry incurs wage costs totalling about CHF 3.61 billion. The hotel industry is an intensively service-oriented branch; average staff

expenses amount to 35.9% of the total turnover[1]. The degree of concentration on property is considerable with fixed assets accounting for 82.7% of the total assets. As a result of the high proportion of fixed assets (around CHF 14.3 billion), its levels of depreciation, maintenance and finance are extremely high. Only 14% (or some CHF 2.7 billion all told) of the invested capital is self-financed. Happily, the Swiss hotel industry has succeeded in reducing borrowed capital by some CHF 3 billion and increasing equity capital from 5% to 14% in the period between 1997 and 2001.

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

Projection for the hotel trade as a whole

The whole of Switzerland (all regions)	1998	1999	2000	2001
Total turnover in CHF 1000	8297767	8358187	8658510	8600794
Personnel expenses in CHF 1000	3454651	3463358	3539653	3610625
Profit/loss in CHF 1000	296694	283179	380740	307673
Current assets in CHF 1000	1631567	1553457	1713025	1533240
Fixed assets in CHF 1000	15175978	14564506	14933739	14304574
Fixed assets in % of the total capital	85.40%	83.20%	82.80%	82.7%
Borrowed capital	14663961	13436487	14084036	13150918
Equity capital in CHF 1000	2143584	2681477	2562727	2686895
Equity capital in % of the total capital	10.40%	12.90%	13.00%	14.00%

Productivity and gross value added

In the year 2001 it was possible to achieve a further increase in productivity (average turnover per employee per year) to CHF 117 507 (previous year 114 590). The wage costs per employee rose by 2.6% to CHF 46095 compared to the previous year, personnel expenses as a proportion of tunrover account for 35.9%, 2.3% more than in the year 2000. Gross value added increased by about CHF 1000 to almost CHF 68000 due to more efficient use of personnel.

Turnover per employee	103414	103870	114590	117507
Gross value added per employee	59263	60830	66882	67832
Personnel expenses per employee	42955	42897	44947	46095

The majority of hotel guests are foreigners

Overnight stays by country of residence of guests (in millions)				
Country of residence	1992	2001	2002	2003
Switzerland	14.0	14.3	14.2	14.2
Total of foreign countries	20.2	19.3	17.8	17.0
Germany	6.8	6.3	5.5	5.3
United Kingdom	1.8	2.0	1.9	1.8
France	1.4	1.2	1.2	1.1
Italy	1.4	0.9	0.9	1.0
Belgium	1.0	0.7	0.7	0.7
Netherlands	0.9	0.9	0.8	0.8
Nordic countries [1)]	0.5	0.4	0.4	0.4
Russia, Federation [2)]		0.2	0.2	0.2
Spain	0.4	0.3	0.3	0.3
Austria	0.4	0.3	0.3	0.3
Other countries Europe	0.9	1.1	1.0	1.0
Europe total (excl. Switzerland)	15.5	14.3	13.2	12.9
United States	1.9	1.9	1.6	1.4
Canada	0.2	0.2	0.2	0.2
Brazil	0.1	0.1	0.1	0.1
Other countries America	0.2	0.2	0.2	0.1
America total	2.4	2.4	2.1	1.8
Japan	0.8	0.8	0.7	0.6
Israel	0.3	0.2	0.2	0.2
India	0.1	0.2	0.2	0.2
Other countries Asia	0.6	0.8	0.9	0.8
Asia total	1.8	2.0	2.0	1.8
Africa	0.3	0.3	0.3	0.3
Australia, Oceania	0.2	0.2	0.2	0.2
Other overseas countries	0.5	0.5	0.5	0.5
Total	34.2	33.6	32.0	31.2

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

Grisons comes out top

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

Regions	Supply		Overnight stays 2003 in millions			Occupancy in % of available…	
	Available rooms	Available beds	Swiss	Foreigners	Total	rooms	beds
Grisons	17263	33096	2.9	2.7	5.6	49.9	46.3
Bernese Oberland	11259	21278	1.5	1.8	3.3	44.4	41.9
Central Switzerland	13199	24518	1.3	1.6	3.0	39.5	33.3
Ticino	9521	18346	1.3	1.1	2.4	41.8	36.5
Valais	13261	26032	2.0	2.1	4.1	46.1	43.2
Vaud	9438	17545	0.9	1.4	2.4	46.8	36.9
Schweizer Mittelland	9151	15743	1.1	0.8	1.9	42.4	32.3
Fribourg-Neuchâtel-Jura	4285	8215	0.4	0.2	0.6	26.9	19.6
Eastern Switzerland	9176	16588	1.1	0.6	1.7	35.3	27.7
Zurich	11992	20257	1.0	2.2	3.2	56.4	43.9
Basle-City/Basle-Country	4040	6490	0.3	0.5	0.9	47.1	36.4
Geneva	7957	12710	0.3	1.9	2.2	59.9	47.9
Switzerland	120542	220818	14.2	17.0	31.2	45.7	38.7

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

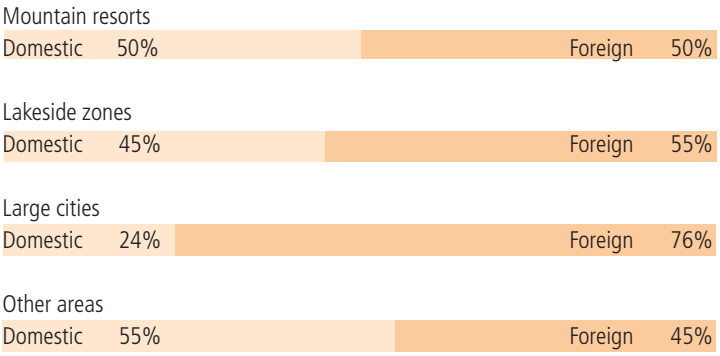
Available hotel beds in tourist areas								
Year	Mountain resorts	Lakeside zones	Large cities	Other areas	Percent of total			
					Mountain resorts	Lakeside zones	Large cities	Other areas
1992	79400	46400	31100	65800	36	21	14	29
2001	76900	45200	31900	66200	35	21	14	30
2002	75100	45400	31700	66200	34	21	15	30
2003	76500	45200	32300	66900	35	20	15	30

Source: Federal Statistical Office

Hotel overnight stays in tourist areas								
Year	Mountain resorts in millions	Lakeside zones in millions	Large cities in millions	Other areas in millions	Percent of total			
					Mountain resorts	Lakeside zones	Large cities	Other areas
1992	14.0	7.2	5.3	7.7	41	21	15	23
2001	13.0	7.0	6.0	7.6	39	21	18	23
2002	12.1	6.7	5.8	7.4	38	21	18	23
2003	12.2	6.2	5.5	7.3	39	20	18	23

Source: Federal Statistical Office

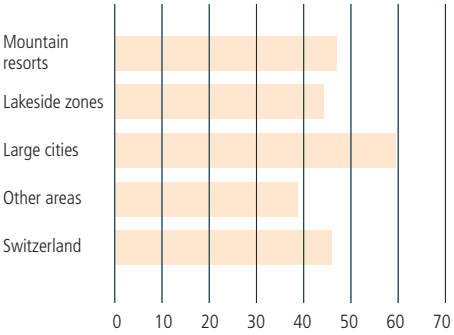
2003: Shares of domestic and foreign overnight stays in hotels vary according to the areas



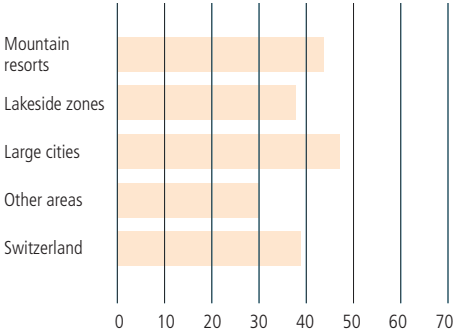
Source: Federal Statistical Office

2003: Highest occupancy in large cities

Occupancy in percent of available rooms



Occupancy in percent of available beds



Source: Federal Statistical Office

Large cities have the highest bed occupancy

Bed occupancy in tourist areas in percent

Year	Mountain resorts		Lakeside zones		Large cities		Other areas	
	existing beds[1)]	available beds[1)]	existing beds[1)]	available beds[1)]	existing beds[1)]	available beds[1)]	existing beds[1)]	available beds[1)]
1992	36	48	37	42	46	47	30	32
2001	34	46	36	42	51	52	29	32
2002	32	44	35	40	49	50	29	31
2003	33	44	33	38	46	47	28	30

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	55.2%	Winter	44.8%

Source: Federal Statistical Office

Accommodation: Supplementary accommodation

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

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

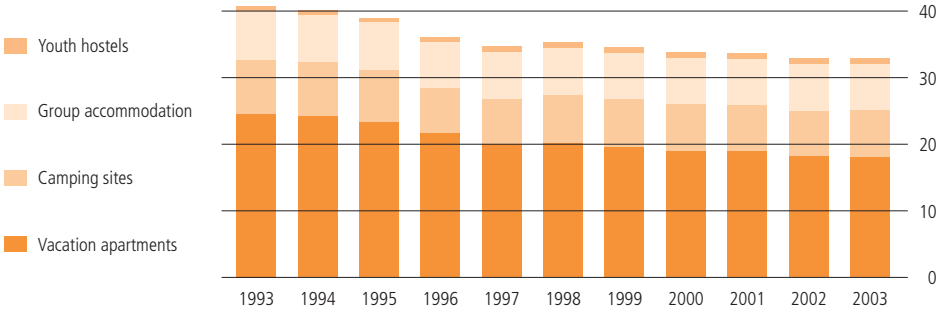
Beds/lodgings in supplementary accommodation

Types of accommodation	1992		2001		2002		2003	
	Units	in %	Units	in %	Units	in %	Units	in %
Vacation apartments	360000[1)]	42	360000[1)]	45	360000[1)]	45	360000[1)]	45
Camping sites	261700	31	210000	26	207400	26	205995	26
Group accommodation	224300	26	229000	28	233200	28	221813	28
Youth hostels	8000	1	6200	1	6600	1	6097	1
Total	854000	100	805200	100	807200	100	793905	100

1) As per 1986 survey

Source: Federal Statistical Office

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



Source: Federal Statistical Office

The majority of guests in supplementary accommodation are Swiss

Overnight stays in all types of supplementary accommodation (in millions)[1]				
Country of residence	1991/92	2000/01	2001/02	2002/03
Switzerland	24.7	21.0	21.2	21.5
Total of foreign countries	16.4	12.6	11.7	11.4
Germany	8.9	6.8	6.3	6.0
United Kingdom	0.7	0.6	0.6	0.6
France	0.9	0.6	0.6	0.6
Italy	0.6	0.4	0.4	0.4
Belgium	1.2	0.8	0.8	0.7
Netherlands	2.5	1.9	1.7	1.6
Nordic countries[2]	0.2	0.2	0.2	0.2
Spain	0.2	0.1	0.1	0.1
Austria	0.2	0.1	0.1	0.1
Russia, Federation[3]		0.0	0.0	0.0
Other countries Europe	0.4	0.5	0.3	0.5
Europe total (excl. Switzerland)	15.8	12.0	11.1	10.8
United States	0.2	0.3	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	0.0	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	0.0
India	0.0	0.0	0.0	0.0
Other countries Asia	0.1	0.1	0.1	0.2
Asia total	0.2	0.2	0.2	0.2
Africa	0.0	0.0	0.0	0.0
Australia, Oceania	0.1	0.1	0.1	0.1
Other overseas countries	0.1	0.1	0.1	0.1
Total	41.1	33.6	32.9	32.9

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

Mainly Swiss and Germans in all types of supplementary accommodation

Country of residence	Overnight stays by type of supplementary accommodation 2002/03 [1]				
	Vacation apartments	Camping sites	Group accommod.	Youth hostels	Total
Switzerland	10579000	5340452	5054788	484970	21459210
Total of foreign countries	7381009	1731581	1959689	343708	11415987
Germany	4337852	713971	837012	117113	6005948
Netherlands	1021067	532545	76906	11039	1641557
Belgium	434684	41960	261637	5562	743843
France	386892	78490	158603	18037	642022
United Kingdom	332867	97032	147226	22437	599562
Italy	242175	87119	75549	13571	418414
United States	94317	8117	103805	18990	225229
Austria	53202	20908	23185	5685	102980
Spain	33824	32515	13464	12099	91902
Australia/Oceania	11873	15960	35587	9692	73112
Luxembourg	37064	3841	13533	650	55088
Other foreign countries	395192	99123	213182	108833	816330
Total	17960009	7072033	7014477	828678	32875197

1) November–October

Source: Federal Statistical Office

More overnight stays in supplementary accommodation during the summer season

Winter	47%	Summer	53%

Source: Federal Statistical Office

Types of accommodation	Overnight stays in supplementary accommodation	
	Winter Nov. 2002–April 2003 in millions	Summer May–Oct. 2003 in millions
Vacation apartments	11.2	6.8
Camping sites	0.9	6.1
Group accommodation	3.2	3.9
Youth hostels	0.3	0.5
Total	15.5	17.3

Source: Federal Statistical Office

A dynamic, innovative hotel and catering industry: a key tourism industry and an important sector of the Swiss economy.

The Swiss hotel and catering industry offers an extremely diverse range of services, provided by about 30000 hotel and catering establishments of the most varied character and orientation. The high density of establishments (one business for every 240 inhabitants) is very advantageous for guests. For the industry however, it presents an image problem created by establishments that fall short of the requirements of a catering business. At the same time, it also presents an enormous challenge and an incentive to improve performance. To summarize, it is clear that the number of hotel and catering businesses in our country is far too high. This has the effect of depressing the annual turnover of individual businesses.

Although exact figures are not available, it can be assumed that in 2003, the hotel and catering industry generated an overall turnover of around CHF 22 billion (catering industry around CHF 15.5 billion; hotel industry around CHF 6.5 billion). This also creates significant VAT revenue. According to 2001 VAT statistics, the 25140 businesses liable for tax achieved a total turnover of CHF 21679.1 million. The VAT payable on this turnover amounted to CHF 1252.1 million gross, CHF 807.3 million net.

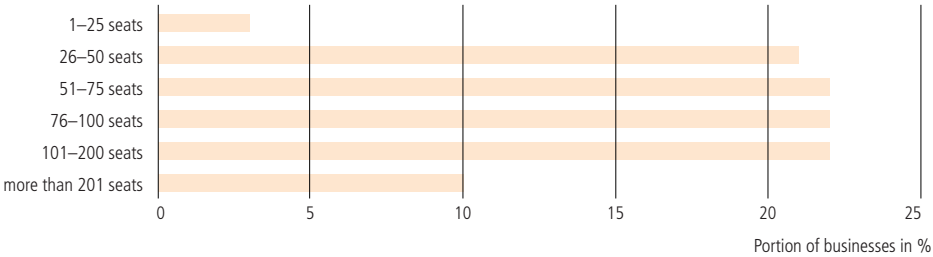
As a key tourism industry, the hotel and catering industry is one of the major sectors of our economy. With 215000 jobs, it is also one of the most important employers with personnel costs of over CHF 9 billion.

Hotel and catering businesses also provide a significant amount of work for the building industry, banks, local service industries and specialized businesses. In addition, the hotel and catering industry is also a major consumer of domestic products (agriculture and farming, industry) and an interesting source of foreign currency earnings.

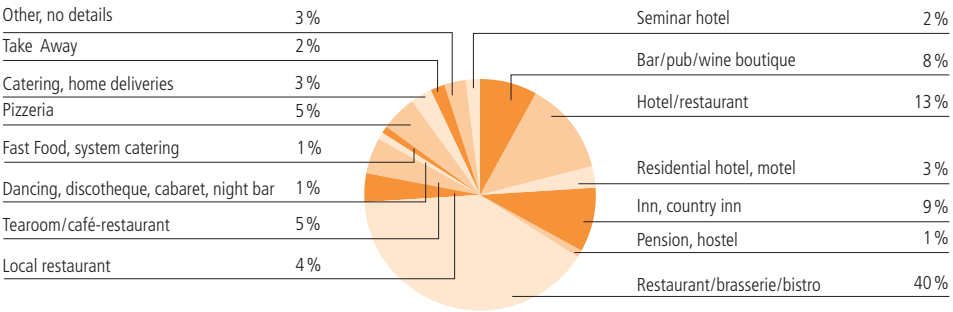
Further information:
GastroSuisse, Economic Department,
Tel: 044 377 52 71.

Sources pages 23–27: Surveys conducted by Gastroconsult AG/GastroSuisse, branch situation 2004 with comprehensive facts & figures on the hotel and catering industry and tourism.

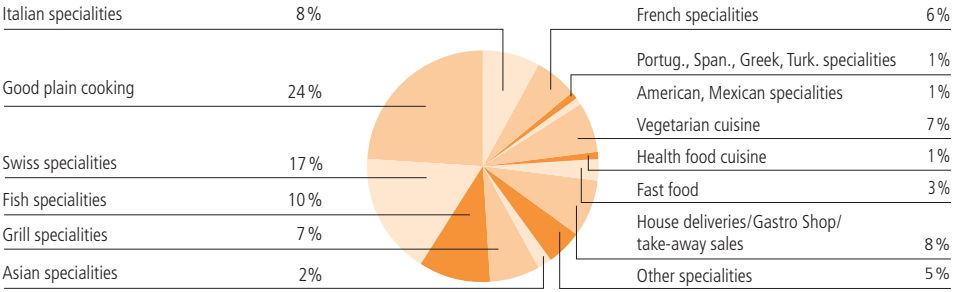
Business size: number of seats per restaurant



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



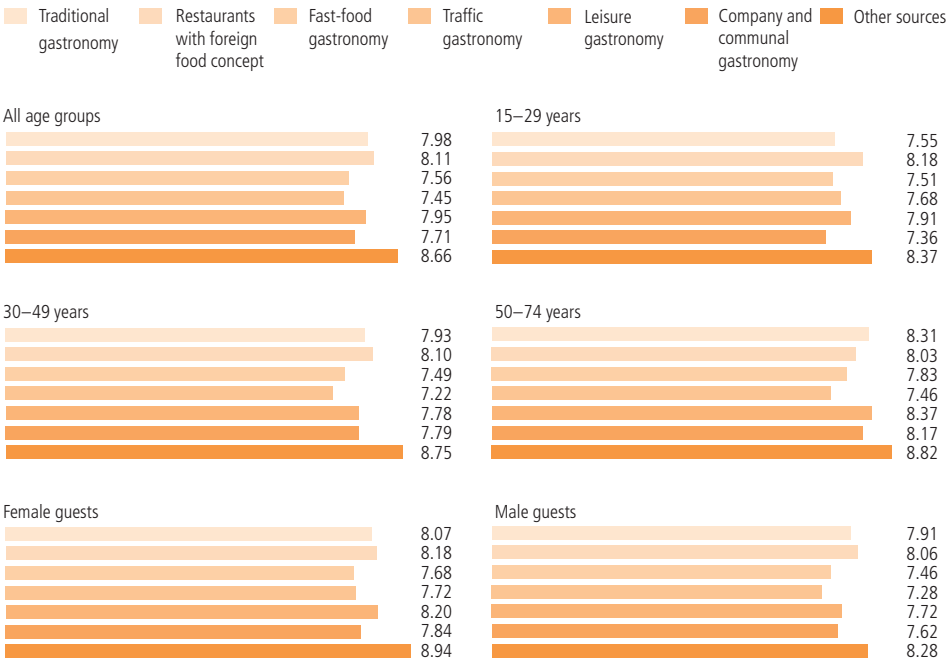
The offer of «good plain cooking» and Swiss specialities still most popular



Guest rating: good for traditional gastronomy and restaurants with foreign food concept

Overall guest satisfaction, according to age and sex

(scale of 1 to 10, 1 = very poor, 10 = excellent)



Copyright Marketingold AG

Since 2002, the current survey «Eating & Drinking Out» has also reported on guest satisfaction as well as consumer behaviour. Guests surveyed rated the catering establishments visited on the basis of consummation (food and drink).

The fast food and traffic gastronomy, which already last year received the worst rating in the survey, again came off far worse than the remainder of the catering industry. Traditional gastronomy and restaurants with a foreign food concept were generally rated as good. Leisure gastronomy, which last year was rated better than all other catering sectors, did not receive quite such a good rating in 2003.

Female guests consistently gave more positive ratings than male guests. Leisure gastronomy in particular was given a considerably better rating by female guests.

Employment statistics: hotel and catering industry as a touristically important and modern employer

Persons employed			Variation	
	4th quarter 2003	4th quarter 2002	absolute	%
Full-time employees (90% and over)	150100	157600	−7500	−4.8
Part-time employees (50–89%)	26800	26900	−100	−0.4
Part-time employees (< 50%)	38100	36000	+2100	+5.8
Total number of employees (overall)	215000	220500	−5500	−2.5

Based on employment figures from the Federal Office of Statistics, the 4th quarter of 2003 showed a slight overall reduction of 2.5%, from 220500 to 215000, in the number of jobs in the hotel and catering industry compared with the 4th quarter of 2002. However, this reduction in the number of hotel and catering industry employees is significantly lower than the average almost 5% drop in turnover. In this industry, it is often impossible to adjust personnel deployment to a drop in turnover at short notice and this has a negative effect on personnel costs.

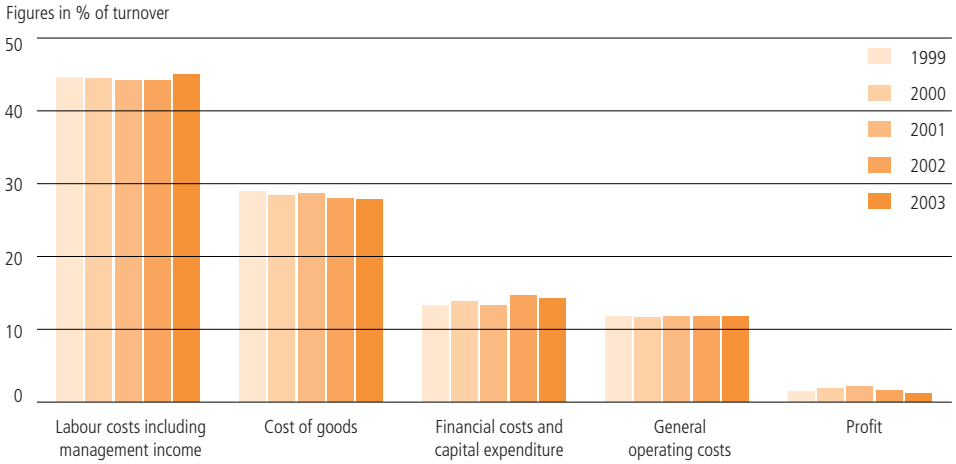
The number of full-time jobs has reduced by 7500 units (–4.8%). A drop is also reported in the number of part-time employees i.e. those with a workload of 50 to 89% of normal working hours (–100 units or –0.4%).

The highest percentage increase is seen in the number of part-time employees working less than 50% of normal working hours (+2100 units or +5.8%).

The adaptation to working hours desired by employees and gearing personnel deployment to short-term fluctuations in guest frequency and turnover have led to the current relatively large variations in employee numbers in the hotel and catering industry. With the slight increase in part-time jobs, the industry is meeting the general wish of a large section of the population and confirming its position as a modern employer.

Personnel costs: highest percentage of costs

Cost structure since 1999 (average of all restaurants participating in survey)



A look at the long-term cost structure development shows that the percentage of personnel costs has increased slightly over the last five years (+0.4%). Two contrasting developments have recently contributed to this rise. On the one hand, in the last year the percentage of total personnel costs, i.e. salaries paid to employees, has increased relatively strongly by around 5.5%. At the same time, the percentage of employers' salaries has dropped by almost 1%. If employers had been able to benefit from higher wages to the same degree as employees, personnel costs would have risen by almost 1%.

This increase in the ratio of personnel costs is in contrast to a drop in the corresponding value of the cost of goods (–1.1% in the last five years). Today, the ratio of cost of goods to selling price is considerably less than 30%, a fact of which many guests are largely unaware. They criticise the prices because they mistakenly see the difference between the cost of the goods and the selling price as the «earnings» of the restaurant owner. The significance of the far weightier personnel costs are greatly underestimated.

Transport

A wide variety of means of transportation

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

Public transport

One of the densest railway networks in the world

- The Swiss railway network is approximately 5230 kilometres long:
  - standard gauge: 3544 km, 3006 km of which are used by the Swiss Federal Railways
  - narrow gauge: 1686 km, 74 km of which are used by the Swiss Federal Railways
- The Swiss Federal Railways run some 5000 passenger trains covering approximately 300 000 kilometers daily, half of which are train kilometres operated by long-distance services (Eurocity, Intercity and express trains) the other half regional and suburban services. In 2003, 250 million passengers used Swiss Federal Railways; that is 49 kilometers per person per day on the average.

The Postal Coach as distributor

- 17 postal coach regional centres are partners for transport services provided on order as well as suppliers of information to individual travellers.
- 771 postal bus routes operate over a total route network of some 10 316 km (that is some three times the length of the Swiss Federal Railways network).
- 2226 postal coach drivers transported 100 million passengers in 1954 coaches (75 000 seats), thereby covering 89 million km in total. 1958 postal buses travel a distance equal on average to five times round the Earth.

Over 27 million air travellers

- At the three intercontinental airports of Zurich, Geneva and Basle, 409 913 take-offs and landings with approx. 27.3 million passengers were registered in 2003, some 89% of whom used regular scheduled airlines.
- Approximately 35% of visitors to Switzerland arrive by plane.
- 47.2% of passengers at Swiss airports travel on Swiss airlines.
- In 2003*, the Swiss airline companies network comprised 72 destinations in 44 countries on 4 continents.

* flight schedule, winter 2003/04

Bustling navigation on Swiss lakes

Year	Licensed boats on Swiss lakes and rivers	Hereof steamers	Number of seats	Passengers (in millions)
1985	163	12	62 648	9.43
1990	167	12	63 758	10.00
1995	159	13	67 013	9.98
2000	150	14	65 443	12.18
2001	151	14	64 677	12.31
2002	150	14	64 757	11.35
2003	150	14	64 472	12.09

Source: Association of the Swiss Navigation Companies, Horw

Mountain railways are important in terms of regional economics

The mountainous inner Alpine regions are largely dependent on value added due to tourism. The mountain railways occupy a key position in the tourism-based value added chain. Cableways are often the driving factor in tourist destinations, which means that they also stimulate both direct and indirect value added in other sectors (hotel and catering industries, retail trade).

- The mountain railways provide over 4700 full-time posts which are split up in turn into more than 11 000 jobs (full- and part-time positions).
- More than 40 000 other jobs (full-time positions) in the hotel and supplementary accommodation industries, the retail trade, ski schools and mountain restaurants also depend indirectly on the existence of the mountain railways.
- The mountain railways directly generate gross value added of approximately CHF 380 million/year. If this figure is increased by the indirect value-added effects of the mountain railways, the gross value added per year rises to approx. CHF 2 billion.
- Number of mountain railways in Switzerland: 1790; 12 rack-and-pinion, 58 funicular, 216 shuttle and 120 cable car railways, 314 chair and 1070 ski lifts.
- Transportation capacity: in excess of 1.45 million people per hour.

Passengers in 1997 (in millions)				
	Summer	Winter	Total	
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 (in million CHF)				
	Summer	Winter	Total	
Cog-wheel trains			113.8	14%
Funiculars			53.7	7%
Aerial cable cars }	111.3	528.0	639.3	79%
Skilifts [1]				
Total			806.8	100%

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

Private transport

- The Swiss road network covers 71220 km, 1726 km of which are national highways, 18097 km cantonal highways and 51397 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 2001, some 197 million persons entered Switzerland by road. This means a daily average of 538000 persons in 330000 cars.

Germans top the list

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

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

Swiss Ski Schools

3000 to 4000 licensed ski instructors and back-up instructors are employed by the 190 Swiss Ski Schools. During high season, however, some 7500 persons work as instructors. Besides regular adult and child instruction, most ski schools offer courses in snowboarding, telemark skiing, cross-country skiing as well as other sports and all-inclusive packages on request. In the past few years, there has been a shift from class to private tuition.

Half-day lessons[1] in Swiss Ski Schools

	1999/00	2000/01	2001/02	2002/03
Berne	224182	234262	249330	235479
Grisons	731789	754742	686722	626810
Eastern Switzerland	101055	90564	93221	94435
Vaud	185886	188216	157308	176489
Valais	673432	687657	649402	650601
Western Switzerland	38564	23090	18778	21057
Central Switzerland	126185	126462	113744	122103
Ticino	21577	24965	8812	13730
Total	2102670	2129958	1977317	1940703

1) A half-day lesson corresponds to two hours
Source: SWISS SNOWSPORTS ASSOCIATION

Cycleland Switzerland

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

The hotel – number one for overnight stay accommodation

Number of overnight stays of cycle tourists

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

*2003: no data collection (collection in 2-yearly rhythm, new data 2004)
Source: Cycling in Switzerland

Quality label for the Swiss tourism industry

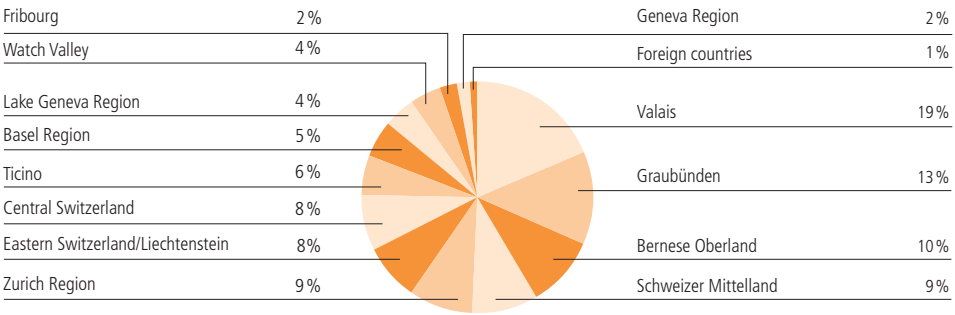
With the «Quality label for the Swiss tourism industry» programme, the sponsoring organisations of Swiss Tourism and many tourist businesses have committed themselves to the clear definition of quality standards for their services in the interest of guests.

Q Level I aims for high service quality.

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

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

Distribution of the label among the Swiss regions (1.5.2004)



Establishments and firms wishing to obtain a quality label should appoint a Quality Representative who is trained as a Quality-Coach (level I) or a Quality-Trainer (level II). The quality label is only awarded to establishments and companies with trained Coaches or Trainer. More than 5000 Quality Representatives have been trained in Switzerland up to now.

	1998	1999	2000	2001	2002	2003	1.5.2004	Total
Labels awarded								
Level I	175	258	186	347	409	345	126	1846
Level II	74	33	27	64	52	67	28	345
Level III						34	9	43
Quality Representatives								
Q-Coaches	1273	669	495	674	669	498	187	4465
Q-Trainer			227	154	179	123	29	712

Volume and revenue shares of international tourism

In 2002, 702.6 million tourists arrivals were reported worldwide, generating revenues to the tune of US$ 474.2 billion.

Region	Arrivals 2002		Income 2002	
	in millions	in %	in billion US$	in %
1. Europe	399.8	56.9	240.5	50.7
2. America	114.9	16.4	114.3	24.1
3. Asia/Pacific	137.2	19.5	94.7	20.0
4. Middle East	27.6	3.9	13.0	2.7
5. Africa	29.1	4.1	11.8	2.5
Total	702.6	100.0	474.2	100.0

Source: World Tourism Organization (WTO, september 2003)

Switzerland's share of worldwide revenue from international tourism is approx. 1.6% in 2002.

Volume and revenue share worldwide

In 2002, the position of Swiss tourism compared with other countries in regard to arrivals and revenue was as follows:

	Arrivals 2002			Revenue 2002		
Destination	in millions	in %	rank	in billion US$	in %	rank
France	77.0	11.0	1.	32.3	6.8	3.
Spain	51.7	7.4	2.	33.6	7.1	2.
United States	41.9	6.0	3.	66.5	14.0	1.
Italy	39.8	5.7	4.	26.9	5.7	4.
China	36.8	5.2	5.	20.4	4.3	5.
United Kingdom	24.2	3.4	6.	17.6	3.7	7.
Canada	20.1	2.9	7.	9.7	2.0	11.
Merxico	19.7	2.8	8.	8.9	1.9	13.
Austria	18.6	2.6	9.	11.2	2.4	8.
Germany	18.0	2.6	10.	19.2	4.0	6.
Hong Kong	16.6	2.4	11.	10.1	2.1	9.
Hungary	15.9	2.3	12.			
Greece	14.2	2.0	13.	9.7	2.0	10.
Poland	14.0	2.0	14.	4.5	0.9	25.
Malaysia	13.3	1.9	15.	6.8	1.4	19.
Turkey	12.8	1.8	16.	9.0	1.9	12.
Portugal	11.7	1.7	17.	5.9	1.2	20.
Thailand	10.9	1.6	18.	7.9	1.7	15.
Switzerland	**10.0**	**1.4**	**19.**	**7.6**	**1.6**	**17.**
Other foreign countries	235.4	33.5		166.4	35.1	
Total	702.6	100.0		474.2	100.0	

Source: World Tourism Organization (WTO, september 2003)

International Tourism Organizations

- **European Travel Commission (ETC)**, Avenue Marnix 19a, Box 25, B-1000 Brussels, Belgium, phone +32 2 502 01 13, fax +32 2 514 18 43, www.etc-corporate.org, info@etc-corporate.org.
- **HOTREC**, Boulevard Anspach 111, Box 4, B-1000 Brussels, Belgium, phone +32 2 513 63 23, fax +32 2 502 41 73, www.hotrec.org, main@hotrec.org.
- **World Tourism Organization (WTO)**, Capitàn Haya 42, E-28020 Madrid, Spain, phone +34 915 678 100, fax +34 915 713 733, www.world-tourism.org, omt@world-tourism.org.

Tourism Associations and Institutes

Tourism Interest Groups and Professional Associations

- **Association of Swiss Tourism Managers (ASTM)**, P.O.Box 175, 8041 Zurich, phone +41 (0)44 481 04 69, fax +41 (0)44 481 04 72, www.vstm.ch, info@vstm.ch. Established in 1928. Objectives: To promote the professional interests of tourist office managers. Vocational training and advanced training of tourist office personnel, co-operation with other associations, lobbying.
- **Association of the Swiss Navigation Companies**, Ebenaustrasse 20, 6048 Horw, phone +41 (0)41 340 44 74, fax +41 (0)41 340 68 74, www.vssu.ch. Established: 1898. Tasks: Promotion of navigation on Swiss rivers and lakes, safeguarding the interests of the 15 member shipping companies, collaboration with tourist organisations.
- **Automobile Club of Switzerland (ACS)**, Wasserwerkgasse 39, 3000 Berne 13, phone +41 (0)31 328 31 11, fax +41 (0)31 311 03 10, www.acs.ch, acszv@acs.ch. Established in 1898. Objectives: European breakdown service, to safeguard the interests of motorists, legal counseling and support, emergency road service, tourist service.
- **Bed and Breakfast Switzerland**, Route des Liddes 12, 3960 Sierre, phone +41 (0)27 456 20 06, fax +41 (0)27 456 20 06, www.bnb.ch, cathy.renggli@bnb.ch. Established in 1999. Association of host families. Purpose: information, promotion, publication «B&B Switzerland» guide, quality standards.
- **Community of interest (directors) of the Higher Schools of Tourism Management Switzerland**, c/o IST AG, Josefstrasse 59, 8005 Zürich, phone +41 (0)1 440 30 90, fax +41 (0)1 271 71 17. Founded: 2001. Tasks: Safeguarding common interests towards the public authorities, associations and general public, promotion of tourism management education and training in Switzerland. The following schools are members: Ecole Suisse de Tourisme, Sierre (www.est-stf.ch), Höhere Fachschule für Tourismus Graubünden (www.academia-engiadina.ch), Höhere Fachschule für Tourismus, Luzern (www.hsw.fhz.ch), Internationale Schule für Touristik AG, Zürich (www.ist-zurich.ch), Scuola superiore alberghiera e del turismo, Bellinzona (www.ssat.ch)
- **Cycling in Switzerland**, Office: STF, P.O.Box 8275, 3001 Berne, phone +41 (0)31 307 47 40, fax +41 (0)31 307 47 48, www.cycling-in-switzerland.ch, www.humanpoweredmobility.ch, info@veloland.ch. Established in 1995. Tasks: Quality assurance, information (route guide and route map), development of national and regional cycling-routes and slowUp (regional car-free adventure days), offers for combined mobility for leisure, tourism and everyday use.
- **GastroSuisse**, Blumenfeldstrasse 20, P.O.Box, 8046 Zurich, phone +41 (0)44 377 51 11, fax +41 (0)44 377 55 90, www.gastrosuisse.ch, info@gastrosuisse.ch. Established: 1891.

GastroSuisse is the leading national association for the hotel and catering industry. Over 20000 members (hotels, bed & breakfast establishments, guest houses, restaurants and cafes) in 26 cantonal sections belong to Switzerland's largest employer's association. Together with its affiliated businesses and institutions, GastroSuisse is active nation-wide, providing information and services for its members. Information and advice, training and further training, trade manual publication, «GastroJournal» trade newspaper, hotel management schools, recruitment marketing, public relations, social insurances, employment agency, full trustee service, «SchweizDirekt» Hotel & Travel Magazine, an advertising platform with an innovative Internet presence.

- **hotelleriesuisse** (Swiss Hotel Association), Monbijoustrasse 130, P.O.Box, 3001 Berne, phone +41 (0)31 370 41 11, fax +41 (0)31 370 44 44, www.swisshotels.ch, info@swisshotels.ch. Established in 1882. National association of the leading and classified hotels in Switzerland. Some 2400 members with 180000 beds (75% of all overnight stays). Support of members in entrepreneurial and professional matters, representation of interests, shaping and influencing the political and economic environment of the hotel trade, basic and advanced training, consulting and technical management planning.
- **Hotel & Gastro Union**, Adligenswilerstrasse 29/22, P.O.Box 4870, 6002 Lucerne, phone +41 (0)41 418 22 22, fax +41 (0)41 412 03 72, www.GastroLine.ch, info@hotelgastrounion.ch. Established in 1886. Objective: Union of employees, professionals and management staff of the hotel/restaurant trade. Basic and advanced training of hotel and catering staff and management. Commitment to attractive, secure employment in Swiss tourism.
- **Public Transport Association**, Dählhölzliweg 12, 3000 Berne 6, phone +41 (0)31 359 23 23, fax +41 (0)31 359 23 10, www.voev.ch, info@voev.ch. Established in 1889. Objectives: To safeguard the interests of members, to encourage cooperation among members, information and consultation services, training of professionals.
- **Safety in adventures**, Münsterplatz 3, 3011 Berne, Office: SQS, Luigi Arigoni, Ruchenbergstrasse 23, 7000 Chur, phone +41 (0)81 356 00 21, fax +41 (0)81 356 00 22, www.safetyinadventures.ch, luigi.arigoni@sqs.ch. Established in 2002. The foundation «Safety in Adventure» supports the cause of safety for adventure and outdoor activities offered on a commercial basis in Switzerland. Certification procedure on the basis of a safety concept; certified undertakings are awarded a safety label.
- **Swiss Association of coffeehouse-holders (SCV)**, Bleicherweg 54, 8039 Zurich, phone +41 (0)1 201 67 77, fax +41 (01) 201 68 77, www.cafetier.ch,

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

- **Swiss Cableways**, Dählhölzliweg 12, 3000 Berne 6, phone +41 (0)31 359 23 33, fax +41 (0)31 359 23 10, www.seilbahnen.org, info@seilbahnen.org. Established in 1970. Objectives: To safeguard the interests of the members, information and consultation services, common policies on tariffs and standardized tickets, vocational training and advanced training for personnel at all levels.
- **swisscamps**, Swiss Camping Association, Bahnhofstrasse 2, 3322 Schönbühl, phone +41 (0)31 852 06 26, fax +41 (0)31 852 06 27, www.swisscamps.ch, info@swisscamps.ch. Established in 1975. Objectives: Promotion of camping vacations and classification of camp sites.
- **SWISS CITIES**, c/o Switzerland Tourism, Tödistrasse 7, 8027 Zurich, phone +41 (0)1 288 12 84, fax +41 (0)1 288 12 05, www.MySwitzerland.com, stephan.bernhard@switzerland.com. Group of 27 Swiss Cities promoting urban tourism on the practical and the political levels. Marketing activities worldwide.
- **Swiss Federal Railways (SBB)**, Hochschulstrasse 6, 3000 Berne 65, phone +41 (0)51 220 11 11, www.sbb.ch, web.railinfo@sbb.ch. The Swiss Federal Railways are a limited company (special law), owned by the state, and at the same time Switzerland's biggest service company in the public transport sector.
- **Swiss Federation of Travel Agencies (SFTA)**, Etzelstrasse 42, P.O.Box, 8038 Zurich, phone +41 (0)1 487 30 50, fax +41 (0)1 480 09 45, www.srv.ch, mail@srv.ch. Established in 1928. Objectives: Association of qualified travel agencies in Switzerland to develop professional skills, protect the interests of the profession, professional assistance to SFTA members.
- **Swiss holiday farms**, 8595 Altnau, phone +41 (0)71 695 23 72, fax +41 (0)71 695 23 67, www.bauernhof-ferien.ch, info@feierlenhof.ch. Established in 1988. Purpose: Support of the members, information and consultation services, basic and advanced training of host families. Quality standards (seal of quality). Central booking office at Swiss Travel Savings Fund.
- **Swiss Hotel Schools Association (ASEH)**, 1897 Le Bouveret, phone +41 (0)79 402 77 77, fax +41 (0)24 482 88 90, www.aseh.ch, info@aseh.ch. Association of Switzerland's leading hotel management schools. The Association welcomes hotel management schools located in Switzerland who meet and abide by the strict quality standards outlined in its bylaws.
- **Swiss Post**, Postbus, Helvetiastrasse 17, 3030 Berne, phone +41 (0)31 338 49 57, fax +41 (0)31 338 05 70, www.postauto.ch, postauto@post.ch. Leading provider of regional public road services for passenger transportation. 17 regional postbus centers.

- **SWISS SNOWSPORTS**, Hühnerhubelstrasse 95, P.O.Box 182, 3123 Belp, phone +41 (0)31 810 41 11, fax +41 (0)31 810 41 12, www.snowsports.ch, info@snowsports.ch. Founded in 1932 (SIAS) + 1934 (SSSA), fusion in 2002 to SSSA SWISS SNOWSPORTS ASSOCIATION. Objectives: Alliance of tourism sector institutions interested in joint promotion of the Swiss Ski School system. Education of ski, snowboard, telemark and cross-country teachers.
- **Swiss Spa**, Avenue des Bains 22, 1400 Yverdon-les-Bains, phone +41 (0)24 420 15 21, fax +41 (0)24 423 02 52, www.heilbad.org, info@heilbad.org. Established in 1924. Objectives: To safeguard and promote the economic, legal, social and scientific interests of the Swiss thermal spas. In particular, the association commits itself to respect the qualitative standards imposed by the legal prescriptions relation to thermal spas. Close cooperation with the medical profession.
- **Swiss Tourism Federation (STF)**, Finkenhubelweg 11, P.O.Box 8275, 3001 Berne, phone +41 (0)31 307 47 47, fax +41 (0)31 307 47 48, www.swisstourfed.ch, stv@swisstourfed.ch. Established in 1932. Objectives: To safeguard the interests of those responsible for tourism in Switzerland and to participate in all tourism policy decisions; to provide information about the importance of tourism and to contribute to tourism research.
- **Swiss Travel Savings Fund (Reka)**, Neuengasse 15, 3001 Berne, phone +41 (0)31 329 66 33, fax +41 (0)31 329 66 01, www.reka.ch, info@reka.ch. Established in 1939. Objectives: The promotion of social and family tourism, vacation financing by issuing Reka cheques, running of REKA vacation centres, vacation apartment rentals.
- **Swiss Travel Association of Retailers (STAR)**, Badenerstrasse 808, 8048 Zürich, phone +41 (0)1 439 60 66, fax +41 (0)1 439 60 67, www.star.ch, star@star.ch. Established: 1995. Association of independent travel retailers with the following objectives: representation of interests inside and outside the trade, promotion of quality in the travel business by information, training and other measures. Establishment of a franchise chain and supply of software and other services via various associate companies.
- **Swiss Youth Hostels (SYH)**, Schaffhauserstrasse 14, P.O.Box, 8042 Zurich, phone +41 (0)1 360 14 14, fax +41 (0)1 360 14 60, www.youthhostel.ch, bookingoffice@youthhostel.ch. Established in 1924. Objectives: Promotion of youth travel, accommodation for young travellers, youth groups, schools, families, etc.
- **Switzerland Convention & Incentive Bureau (SCIB)**, Tödistrasse 7, P.O.Box, 8027 Zurich, phone +41 (0)1 288 12 71, fax +41 (0)1 201 53 01, www.MySwitzerland.com, scib@switzerland.com. Established in 1964. Objectives: Promotion of Switzerland as a meeting and congress destination.

- **Switzerland Travel Centre Ltd.** (former SDM Ltd.), Headquarters: Grubenstrasse 12, P.O.Box, 8045 Zurich, phone +41 (0)43 266 20 00, fax +41 (0)43 266 20 01, www.stc.ch, zuerich@stc.ch. Information and booking: 00800 100 200 30. Foundation: 1998. Purpose: information and booking center for tourism offers in Switzerland. Housing, travel agent products, service/call centre offers, consulting.
- **TOUREX**, Association of Swiss Tourism Experts, c/o Silvia Tschumper, Klosbachstrasse 54, 8032 Zürich, phone +41 (0)1 251 87 24, fax +41 (0)1 251 87 26, www.tourex.ch, info@tourex.ch. TOUREX comprises more than 130 members active on management level in all branches in the Swiss tourism and travel industry. Its goals are a strong public presence in all matters of tourism and travel policies in Switzerland as well as courses and seminars for its members, thanks to a professional platform active in the consulting and coaching areas. The diploma of a Swiss Tourism Expert is the highest post-graduate title in the Swiss tourism & travel industry.
- **Touring Club of Switzerland (TCS)**, ch. de Blandonnet 4, 1214 Vernier, phone +41 (0)22 417 27 27, fax +41 (0)22 417 20 20, www.tcs.ch. Established in 1896. Objectives: To safeguard the interests of the motorist, legal counseling and support, emergency road service, tourist service.
- **Wellbeing Switzerland**, Office of Swiss Health Hotels, Oberdorfstrasse 53b, 9100 Herisau, phone +41 (0)71 350 14 14, fax +41 (0)71 350 14 18, www.wohlbefinden.com, info@wohlbefinden.com. Established in 1992. Representing the interests of health hotels, rehabilitation and convalescent homes on health-policy issues; information as to range and availability of health treatment in Switzerland.

Public corporations

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

Federal institutes

- **Federal Government Commission for Tourism**, Secretariat, Belpstrasse 18, 3003 Berne, phone +41 (0)31 322 27 58. Established in 1973. Objectives: This Commission coordinates tourism policy within the Federal administration.
- **State Secretariat for Economic Affairs**, Tourism, Belpstrasse 18, 3003 Berne, phone +41 (0)31 322 27 58, fax +41 (0)31 322 27 49, www.seco-admin.ch. Established in 1935. Objectives: Central Federal authority for tourism, secretariat of the Federal Government Commission for Tourism.
- **Swiss Federal Statistical Office**, Tourism Division, Espace de l'Europe 10, 2010 Neuchâtel, phone +41 (0)32 713 67 14, fax +41 (0)32 713 68 58, www.statistik.admin.ch, Info-Tour@bfs.admin.ch. Established in 1860. Objectives: To provide statistics on Swiss tourism (surveys on infrastructure, arrivals and overnight stays in hotels and supplementary accommodation, tourism balance of payments, reports on special subjects).
- **Swiss Federal Transport Office**, Bollwerk 27, 3003 Berne, phone +41 (0)31 322 57 11, fax +41 (0)31 322 58 11, www.bav.admin.ch, webmaster@bav.admin.ch. Established in 1873. Objectives: Within the tourism framework, the Federal Transport Office is responsible for issuing aerial cablecar licences.

Institutes of higher education

- **Institute for public services and tourism at the University of St. Gall**, Dufourstrasse 40a, 9000 St. Gall, phone +41 (0)71 224 25 25, fax +41 (0)71 224 25 36, www.idt.unisg.ch, idthsg@unisg.ch. Established in 1941. Objectives: University lecturing, research, market research, consulting and expertising in the competence fields of tourism and transportation, regional economic and public management.
- **University of Berne, Research Institute for Leisure and Tourism (FIF),** Engehaldenstrasse 4, 3012 Berne, phone +41 (0)31 631 37 11, fax +41 (0)31 631 34 15, www.fif.unibe.ch, fif@fif.unibe.ch. Established in 1941. Objectives: Research into tourism-related issues, lectures on tourism at Berne University, experts in the leisure and tourism sectors.
- **Unité d'enseignement et de recherche en tourisme (UERT)** à l'Ecole des HEC des l'Université de Lausanne, BFSH 1, 1015 Lausanne-Dorigny, phone +41 (0)21 692 34 87, fax +41 (0)21 692 33 05, www.hec.unil.ch/uert, uert@hec.unil.ch. Established in 1992. Consolidation course «Tourism» for a first degree. Basic research, expert opinion activity.