

Swiss Tourism in Figures

2005

2004

2003

2002

2001

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Photograph: Desk Design, 3032 Hinterkappelen

Berne, July 2005

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 22.6 billion in 2004, 9.7 billion (or 43%) came from domestic tourism. Expenditure by foreign visitors in Switzerland added some CHF 12.9 billion (3% of the Gross Domestic Product).

Total tourism revenue	1992	2002	2003	2004
		in billion CHF		
From domestic tourists	8.5	9.7	9.6	9.7
From foreign tourists	11.5	12.3	12.4	12.9
Total	20.0	22.0	22.0	22.6
Tourism's share of Swiss Gross Domestic Product	5.8%	5.1%	5.1%	5.1%

Source: Federal Statistical Office

Tourism – an invisible export

The expenditure of foreign guests in Switzerland has the same effect on the Swiss balance of payments as the export of goods. 9 percent of Switzerland's export revenue come from tourism.

Export revenue by industry[1)]	1992	2002	2003	2004
		in billion CHF		
1.Metal and machine industry	38.0	50.3	50.4	54.7
2.Chemical industry	21.3	44.8	45.0	49.4
3.Tourism (Tourism balance of payments)	*11.5*	*12.3*	*12.4*	*12.9*
4.Watchmaking industry	7.4	10.6	10.2	11.1
5.Textile industry	4.6	3.7	3.8	3.9

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		
	2002	2003	2004	2002	2003	2004	2002	2003	2004
Business & vacation stays	6.5	6.2	6.5	8.9[1)]	8.6[1)]	9.4[1)]	–0.5[1)]	–0.7[1)]	–1.1[1)]
Educational & medical stays	1.8	1.7	1.8						
Excursionists, transit visitors	2.8	2.9	3.0	1.4	1.5	1.5	1.4	1.4	1.5
Other tourism	0.1	0.1	0.1						
Consumption expenditure of border-zone inhabitants	1.1	1.5	1.5	0.0	0.0	0.0	1.0	1.5	1.5
Total	12.3	12.4	12.9	10.3	10.1	10.9	2.0	2.3	2.0

1) Incl. educational and medical stays
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 2004, for instance, they spent the following estimated amounts on:

Fuel	CHF 695 million
Tobacco	CHF 137 million
Sweets	CHF 288 million
Souvenirs, crafts	CHF 67 million
Taxi fares	CHF 111 million
Inland water transportation	CHF 20 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).

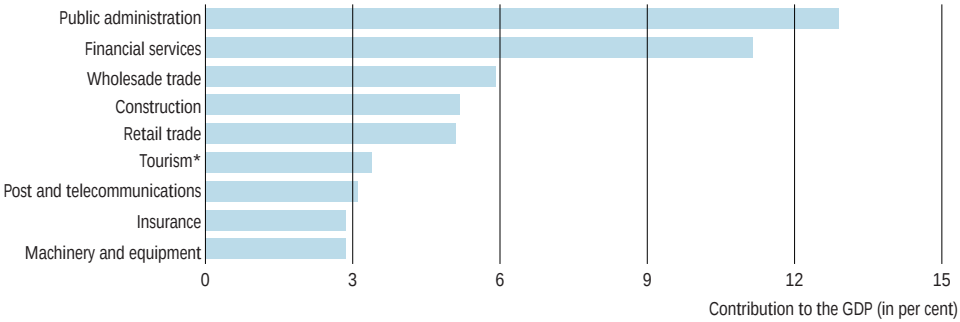
One of the most important branches of the Swiss economy

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



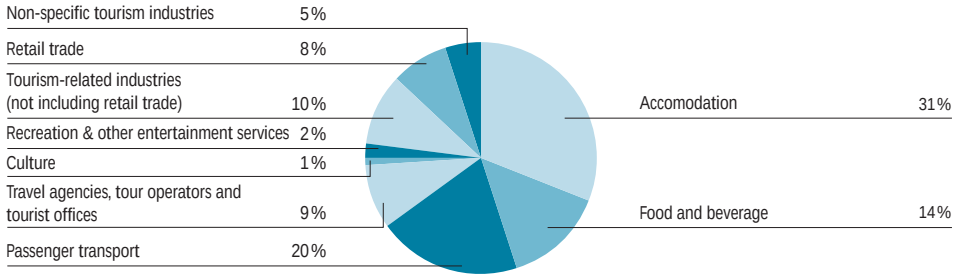
* direct effects

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



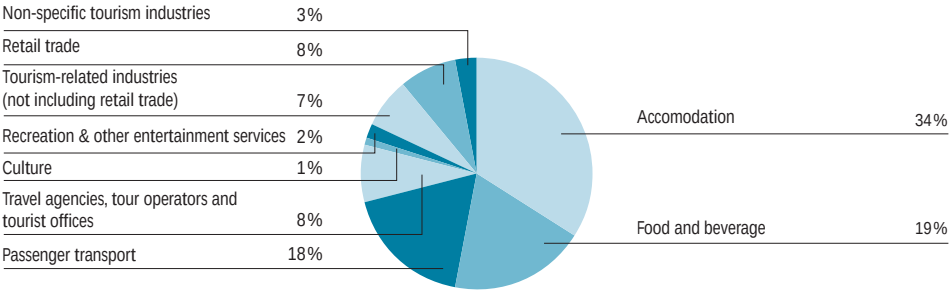
Direct tourism gross value added in Switzerland: CHF 12900 million (= 3.4% of GDP)

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.

166000 jobs directly generated by tourism in Switzerland in 1998



Direct tourism employment in Switzerland: 165500 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 consumption	30610	100
International visitors	14500	47
Same-day visitor	3120	10
Tourists (overnight visitors)	11380	37
Domestic visitor	9790	32
Same-day visitor	4890	16
Tourists (overnight visitors)	4900	16
Domestic business trips	1790	6
Use of second homes on own account or free of charge	690	2
Other components	3840	13

Accommodation: Hotels and supplementary accommodation

Overview of the accommodation sector

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.

Supplementary accommodation includes vacation apartments (chalets, private rooms, etc., excl. beds in second homes which are not sublet to third parties and excl. overnight stays by owners and long-term tenants), camping sites, group accommodation (dormitories for tourists, camp houses, Swiss Alpine Club mountain refuges, summer camp accommodation) and youth hostels.

While tourism statistics on camping sites, group accommodation and youth hostels are based on censuses conducted nationwide, the figures for vacation apartments refer to the cantons of Bern, Obwalden, Graubünden, Ticino and Valais as well as selected locations in the cantons of Appenzell Ausserrhoden, St. Gallen and Glarus. Therefore, these statistics probably cover at least three-quarters of all overnight stays in this type of accommodation in Switzerland. A total figure for all overnight stays can only be based on an estimate.

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

Source: Federal Statistical Office

Overnight stays at hotels for the tourism year 2004

In May 2003, federal budget restrictions prompted the SFSO to discontinue accommodation statistics by the end of 2003. The SFSO then decided to conduct a survey of overnight stays at hotels in January 2004 to provide basic macroeconomic data about growth in the hotel industry. The results presented here come from a survey of 500 randomly selected hotels. This partial fix, however, is not without a certain margin of error since the data is only based on a random sampling. The new survey provides no information about the country of residence of guests and findings cannot be broken down according to regions. That said, it was a temporary solution. Cantonal, regional and federal agencies responsible for promoting tourism have teamed up with the private sector to provide the necessary funding so that accommodation statistics can be reintroduced. An agreement sponsored by the Swiss Tourism Federation made it possible for all hotel accommodation statistics and a portion of supplementary accommodation statistics to be reintroduced in January 2005.

Overnight stays at hotels in 2004

Growth compared to same period in 2003, in %	Total	Foreigners	Swiss
January	–4.1	–3.6	–4.5
February	3.1	7.2	–1.6
March	–4.6	–3.8	–5.5
First Quartal	–1.8	–0.1	–3.9
April	1.8	2.8	0.4
May	5.1	8.4	1.2
June	4.8	8.5	–0.4
Second Quartal	4.0	6.7	0.4
July	1.7	3.9	–1.2
August	–6.0	–2.9	–10.6
September	2.4	3.3	1.3
Third Quartal	–1.0	1.1	–3.6
October	–4.7	–4.3	–5.0
November	2.2	7.0	–2.9
December	–2.8	–3.1	–2.4
Fourth Quartal	–2.3	–1.1	–3.6
Entire year	–0.3	1.7	–2.8

Source: TSA, Swiss Federal Statistical Office

Overnight stays at hotels according to country of residence of guests (in millions)
Tourism year 2003 (November 2002 to October 2003)

	Hotels/ health resorts	Supplementary accommodation				
Country of residence of guests		Chalets, apartments, private room accommodation	Camping sites	Group accom-modation	Swiss Youth Hostels	Total
Switzerland	15.0	10.6	5.3	5.0	0.5	36.4
Total of foreign countries	17.2	7.4	1.7	2.0	0.3	28.6
Germany	5.5	4.3	0.7	0.8	0.1	11.5
United Kingdom[1)]	1.8	0.3	0.1	0.1	0.0	2.4
France	1.2	0.4	0.1	0.2	0.0	1.8
Italy	1.0	0.2	0.1	0.1	0.0	1.4
Belgium	0.7	0.4	0.0	0.3	0.0	1.4
Netherlands	0.8	1.0	0.5	0.1	0.0	2.4
Nordic countries[2)]	0.4	0.1	0.1	0.0	0.0	0.6
Russia	0.2	0.0	0.0	0.0	0.0	0.3
Spain	0.3	0.0	0.0	0.0	0.0	0.4
Austria	0.3	0.0	0.0	0.0	0.0	0.4
Other countries Europe	0.9	0.4	0.1	0.1	0.1	1.4
Europe total (excl. Switzerland)	13.1	7.1	1.7	1.7	0.2	23.9
United States	1.4	0.0	0.0	0.1	0.0	1.6
Canada	0.2	0.0	0.0	0.0	0.0	0.2
Brazil	0.1	0.0	0.0	0.0	0.0	0.1
Other countries America	0.1	0.1	0.0	0.0	0.0	0.2
America total	1.8	0.1	0.0	0.1	0.0	2.1
Japan	0.6	0.0	0.0	0.0	0.0	0.6
Israel	0.2	0.0	0.0	0.0	0.0	0.2
India	0.2	0.0	0.0	0.0	0.0	0.2
Other countries Asia	0.9	0.0	0.0	0.0	0.0	1.1
Asia total	1.8	0.0	0.0	0.0	0.0	2.0
Africa	0.3	0.0	0.0	0.0	0.0	0.3
Australia, Oceania	0.2	0.0	0.0	0.0	0.0	0.2
Other overseas countries	0.5	0.0	0.0	0.0	0.0	0.5
Total	32.2	17.9	7.1	7.0	0.8	65.0

1) Great Britain and Northern Ireland
2) Denmark, Finland, Norway, Sweden and since 1.1.1994 Iceland
Source: Federal Statistical Office

Overnight stays at hotels according to country of residence of guests (in millions)

Winter 2002/03 (November 2002 to April 2003)

	Hotels/ health resorts	Supplementary accommodation				
Country of residence of guests		Chalets, apartments, private room accommodation	Camping sites	Group accom-modation	Swiss Youth Hostels	Total
Switzerland	6.7	6.6	0.7	2.2	0.2	16.4
Total of foreign countries	7.7	4.6	0.2	1.0	0.1	13.6
Germany	2.6	2.8	0.1	0.5	0.0	6.0
United Kingdom[1)]	0.9	0.2	0.0	0.1	0.0	1.2
France	0.6	0.3	0.0	0.1	0.0	0.9
Italy	0.4	0.1	0.0	0.0	0.0	0.6
Belgium	0.4	0.2	0.0	0.1	0.0	0.8
Netherlands	0.4	0.6	0.0	0.0	0.0	1.1
Nordic countries[2)]	0.2	0.1	0.0	0.0	0.0	0.3
Russia	0.1	0.0	0.0	0.0	0.0	0.2
Spain	0.1	0.0	0.0	0.0	0.0	0.1
Austria	0.1	0.0	0.0	0.0	0.0	0.2
Other countries Europe	0.5	0.2	0.1	0.1	0.0	0.6
Europe total (excl. Switzerland)	6.3	4.5	0.2	0.9	0.1	12.0
United States	0.5	0.0	0.0	0.0	0.0	0.6
Canada	0.1	0.0	0.0	0.0	0.0	0.1
Brazil	0.0	0.0	0.0	0.0	0.0	0.0
Other countries America	0.1	0.0	0.0	0.0	0.0	0.0
America total	0.7	0.0	0.0	0.0	0.0	0.7
Japan	0.1	0.0	0.0	0.0	0.0	0.1
Israel	0.1	0.0	0.0	0.0	0.0	0.1
India	0.0	0.0	0.0	0.0	0.0	0.1
Other countries Asia	0.3	0.0	0.0	0.0	0.0	0.3
Asia total	0.5	0.0	0.0	0.0	0.0	0.6
Africa	0.1	0.0	0.0	0.0	0.0	0.2
Australia, Oceania	0.1	0.0	0.0	0.0	0.0	0.1
Other overseas countries	0.2	0.0	0.0	0.0	0.0	0.3
Total	14.4	11.2	0.9	3.2	0.3	29.9

1) Great Britain and Northern Ireland

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

Source: Federal Statistical Office

Overnight stays at hotels according to country of residence of guests (in millions)
Summer 2003 (May 2003 to October 2003)

	Hotels/ health resorts	Supplementary accommodation				
Country of residence of guests		Chalets, apartments, private room accommodation	Camping sites	Group accom-modation	Swiss Youth Hostels	Total
Switzerland	8.2	4.0	4.6	2.9	0.3	20.0
Total of foreign countries	9.5	2.8	1.5	1.0	0.2	15.0
Germany	2.9	1.5	0.6	0.3	0.1	5.4
United Kingdom[1)]	0.9	0.1	0.1	0.1	0.0	1.2
France	0.6	0.1	0.1	0.1	0.0	0.9
Italy	0.5	0.1	0.1	0.1	0.0	0.8
Belgium	0.3	0.2	0.0	0.1	0.0	0.7
Netherlands	0.4	0.4	0.5	0.0	0.0	1.4
Nordic countries[2)]	0.2	0.0	0.0	0.0	0.0	0.3
Russia	0.1	0.0	0.0	0.0	0.0	0.1
Spain	0.2	0.0	0.0	0.0	0.0	0.2
Austria	0.2	0.0	0.0	0.0	0.0	0.2
Other countries Europe	0.5	0.2	0.1	0.1	0.1	0.7
Europe total (excl. Switzerland)	6.8	2.6	1.5	0.8	0.1	11.9
United States	0.9	0.1	0.0	0.1	0.0	1.0
Canada	0.1	0.0	0.0	0.0	0.0	0.1
Brazil	0.1	0.0	0.0	0.0	0.0	0.1
Other countries America	0.0	0.1	0.0	0.0	0.0	0.1
America total	1.1	0.1	0.0	0.1	0.0	1.3
Japan	0.4	0.0	0.0	0.0	0.0	0.5
Israel	0.1	0.0	0.0	0.0	0.0	0.1
India	0.2	0.0	0.0	0.0	0.0	0.2
Other countries Asia	0.6	0.1	0.0	0.0	0.0	0.7
Asia total	1.3	0.1	0.0	0.0	0.0	1.4
Africa	0.2	0.0	0.0	0.0	0.0	0.2
Australia, Oceania	0.1	0.0	0.0	0.0	0.0	0.2
Other overseas countries	0.3	0.0	0.0	0.0	0.0	0.4
Total	17.7	6.8	6.1	3.9	0.5	35.1

1) Great Britain and Northern Ireland
2) Denmark, Finland, Norway, Sweden and since 1.1.1994 Iceland
Source: Federal Statistical Office

Accommodation: Hotels and supplementary accommodation

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 2003 this figure had risen to 258700. 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.

5600 hotels with 259000 beds

Year	Number of hotels	Number of beds	
		existing[1)]	available[1)]
1992	6300	261900	222700
2001	5700	260100	220100
2002	5600	259000	218500
2003	5600	258700	220800

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

In 2003 small and medium-sized hotels predominate

Size of establishment/Price range	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
up to 49.99 CHF	1520	1520	27.1	27.1
50.– to 99.99 CHF	2714	4234	48.5	75.6
100.– to 149.99 CHF	913	5147	16.3	91.9
150.– to 199.99 CHF	284	5431	5.1	97.0
200.– and more	168	5600	3.0	100.00

Source: Federal Statistical Office

Cantons, regions, zones and geographical areas

Swiss tourism statistics are broken down into 26 cantons, 12 regions, 4 zones and 3 geographical areas. Some of the regions overlap with cantons and others stretch across cantonal borders. This is the case for Central Switzerland (LU, UR, SZ, OW, NW, ZG), Eastern Switzerland (GL, SH, SG, TG, AR, AI) and (since 1998) Swiss Mittelland (AG, various districts in BE and SO) and Basel-Stadt/Basel-Landschaft (BS, BL, two districts in SO).

Regions	Supply		Hotel overnight stays 2003 in millions			Occupancy in % of available…	
	Available rooms	Available beds	Swiss	Foreigners	Total	rooms	beds
Zurich	11992	20257	1.0	2.2	3.2	56.4	43.9
Bern	16528	30656	2.2	2.2	4.3	43.4	38.7
Lucerne	5095	9388	0.5	0.8	1.3	42.7	36.7
Uri	1253	2412	0.1	0.1	0.2	30.4	24.8
Schwyz	2685	5155	0.3	0.2	0.5	33.6	27.3
Obwalden	2182	4059	0.3	0.3	0.6	41.5	37.9
Nidwalden	1148	2188	0.1	0.1	0.2	34.9	29.5
Glarus	737	1438	0.1	0.0	0.1	28.6	25.8
Zug	836	1316	0.1	0.1	0.2	53.7	41.0
Fribourg	1793	3423	0.2	0.1	0.3	29.0	21.6
Solothurn	1440	2514	0.2	0.1	0.3	39.8	29.8
Basel-Stadt	2825	4420	0.2	0.5	0.7	51.8	41.0
Basel-Landschaft	1046	1802	0.1	0.1	0.2	36.7	26.6
Schaffhausen	563	1033	0.0	0.1	0.1	35.1	26.4
Appenzell Ausserrhoden	740	1275	0.1	0.0	0.1	29.2	23.5
Appenzell Innerrhoden	556	1029	0.1	0.0	0.1	40.0	31.6
St.Gallen	4939	8732	0.6	0.4	0.9	36.6	29.1
Graubünden	17263	33096	2.9	2.7	5.6	49.9	46.3
Aargau	3031	4899	0.3	0.2	0.6	41.7	31.9
Thurgau	1641	3081	0.2	0.1	0.3	35.4	25.6
Ticino	9521	18346	1.3	1.1	2.4	41.8	36.5
Vaud	9438	17545	0.9	1.4	2.4	46.8	36.9
Valais	13261	26032	2.0	2.1	4.1	46.1	43.2
Neuchâtel	1367	2613	0.1	0.1	0.2	30.4	21.1
Geneva	7957	12710	0.3	1.9	2.2	59.9	47.9
Jura	706	1400	0.1	0.0	0.1	19.7	14.8
Switzerland	120542	220818	14.2	17.0	31.2	45.7	38.7

Source: Federal Statistical Office

	Supply		Hotel overnight stays 2003 in millions			Occupancy in % of available…	
Regions	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
Areas							
Mountain resorts	38958	76483	6.1	6.1	12.2	46.7	43.6
Lakeside zones	24590	45180	2.8	3.4	6.2	44.0	37.6
Large cities	19620	32262	1.3	4.2	5.5	59.1	46.9
Other areas	37373	66893	4.0	3.3	7.3	38.6	29.9
Schwitzerland	120542	220818	14.2	17.0	31.2	45.7	38.7
Geographical areas							
Alps	67783	129976	9.6	9.4	19.0	43.9	40.0
Mittelland	44859	77018	3.9	6.9	10.8	49.5	38.3
Jura	7901	13823	0.8	0.7	1.5	38.6	28.9
Schwitzerland	120542	220818	14.2	17.0	31.2	45.7	38.7
Big cities							
Basle	2735	4255	0.2	0.5	0.7	52.9	42.0
Bern	1663	2729	0.2	0.3	0.5	59.4	47.2
Geneva	5976	9584	0.2	1.5	1.7	61.4	49.3
Lausanne	2385	4239	0.2	0.4	0.6	56.6	41.9
Zurich	6862	11454	0.5	1.5	2.0	60.4	48.6

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 zones of Switzerland, tourism statistics provide separate figures for *mountain resorts* (i.e. located at over 1000 metres above sea level, with some exceptions such as Toggenburg), *lakeside zones* (excl. Geneva, Lausanne and Zurich) and *large cities* (Basel, Bern, Geneva, Lausanne, Zurich). Remaining zones are referred to as «*other zones*».

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

Hotel overnight stays in tourist 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

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

Allocation of turnover and operating expenses in percent (2003)

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 SHC.

Hotel category	*****	****	***	** + *
	%	%	%	%
Earnings on food and beverages	44.3	45.9	57.0	70.9
Earnings on accommodation	49.7	49.9	40.9	28.2
Earnings on other services	6.3	4.2	2.1	1.0
Total turnover	100.0	100.0	100.0	100.0
Expenditure on goods (incl. services)	–15.8	–18.0	–21.9	–26.3
Gross profit I	84.2	82.0	78.1	73.7
Personnel expenses	–44.6	–41.2	–37.3	–29.9
Gross profit II	39.8	40.9	40.8	43.8
Operating expenses	–16.8	–15.6	–13.4	–13.2
Operating result I	23.1	25.3	27.4	30.6
Management expenses	–4.7	–5.8	–7.7	–10.9
Operating result II	18.3	19.6	19.7	19.7
Maintenance	–5.3	–5.1	–4.5	–3.9
Gross operating profit	13.0	14.4	15.1	15.7
Financial and investment expenses	–6.6	–9.0	–8.4	–8.5
Operating cash flow	6.7	5.4	6.7	7.2
Non-recurring earnings and expenses	1.6	1.4	0.9	0.5
Corporate cash flow	8.2	6.7	7.6	7.7
Depreciation	–12.1	–9.0	–10.4	–9.9
Corporate result	–3.6	–2.3	–2.8	–2.1

Level of indebtedness in the hotel trade in percent

Hotel category	*****	****	***	** + *
	%	%	%	%
Level of self-financing	19.3	8.8	8.3	7.0
Level of indebtedness	80.7	92.0	91.6	93.1

Source pages 18–19: Swiss Association for Hotel Credit (Statistical Year 2003)

Important key figures according to hotel category

Hotel category	*****	****	***	** + *
Profit and loss account				
Number of establishments recorded by the SHC	9	79	217	131
Average number of beds	218	97	61	44
Bed occupancy rate on days when open (in %)	47.5	58.7	49.9	30.2
Average duration of stay (days)	3.9	3.5	3.2	2.7
Average accommodation rate	174	104	79	73
Accommodation earnings per bed	27924	17721	10804	5869
Average operating income	12990475	3682631	1664943	821339
Balance sheet				
Current Ratio (in %)	79.0	103.5	119.2	120.8
Indebtedness per bed (in CHF)	116748	89314	60602	48950
Investment per bed (in CHF)	144435	94455	62542	51096
Investment per room (in CHF)	267848	159748	115236	100642
Average balance sheet total (in CHF)	37473018	9239059	3783612	1911375

Hotel-Panel 2001

Meaning and purpose of the Hotel Panel

The Hotel Panel is a joint project of the Swiss Association for Hotel Credit (SHC), the Federal Statistical Office (FSO) and the hotelleriesuisse (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 117507 (previous year 114590). 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 hotel and catering industry: one of the most important sectors of the Swiss economy

Switzerland has an extraordinarily large and diverse range of hotel and catering services. These are provided by around 30000 traditional hotel and catering businesses of the most varied character and orientation. There is one hotel or catering business to approximately every 250 inhabitants. From an economic viewpoint, our country's business density in this branch is far too great and leads to extremely tough competition.

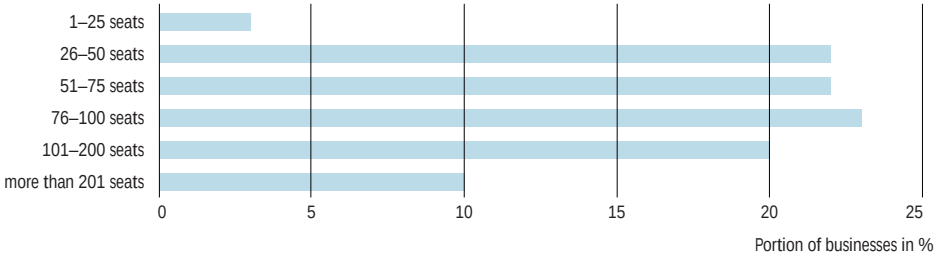
Based on available estimates, in 2004 the hotel and catering industry may have generated a total turnover of around 22 billion Swiss francs (catering around 15.5 billion, hotels around 6.5 billion Swiss francs). This also creates considerable revenue from VAT. According to provisional 2002 VAT statistics, 25654 businesses liable to tax generated a taxable turnover of 23267.1 million Swiss francs. VAT on this turnover amounted to 1386.8 million Swiss francs gross, 823.5 million Swiss francs net.

As a key tourism industry, the hotel and catering segment is one of the most important sectors of our economy and with some 216000 jobs, also one of the major employers. Labour costs amount to over 9 billion Swiss francs.

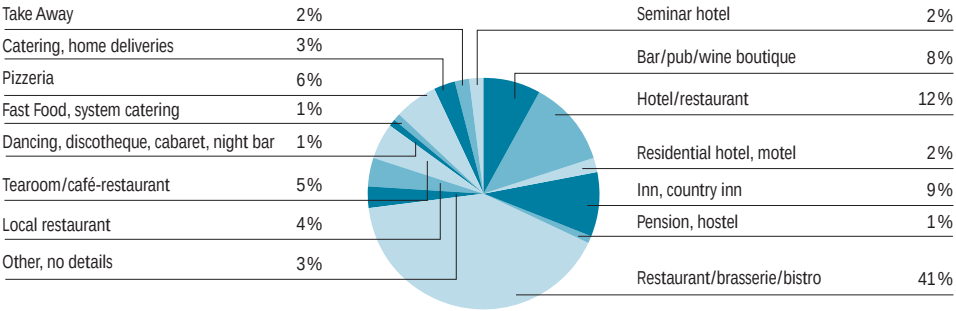
Hotel and catering businesses are also important indirect employers, as clients for the building industry, banks, local service providers and specialized trades.

Source pages 21–25: Surveys conducted by Gastroconsult AG/GastroSuisse, Branch Situation 2005 with comprehensive facts & figures on the hotel, catering and tourism industries.

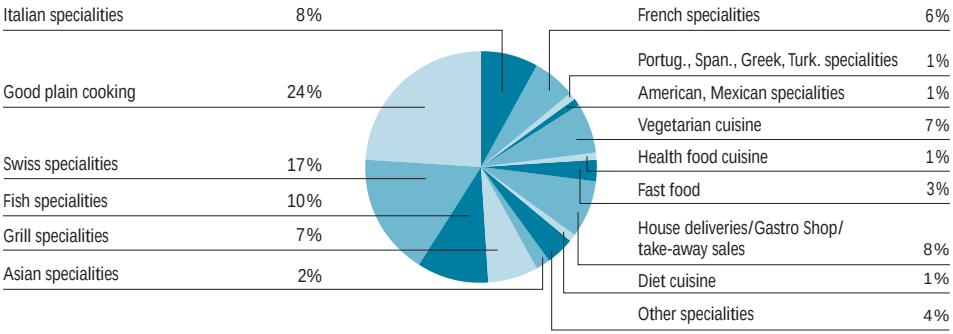
Business size: number of seats per restaurant



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



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



Employment statistics: hotel and catering industry as a touristic, major, modern employer

Persons employed			Variation	
	4th quarter 2003	4th quarter 2004	absolute	%
Full-time employees (90% and over)	150100	145900	–4200	–2.8
Part-time employees (50–89%)	26800	27300	+500	+1.9
Part-time employees (< 50%)	38100	42800	+4700	+12.3
Total number of employees (overall)	215000	216000	+1000	+0.5

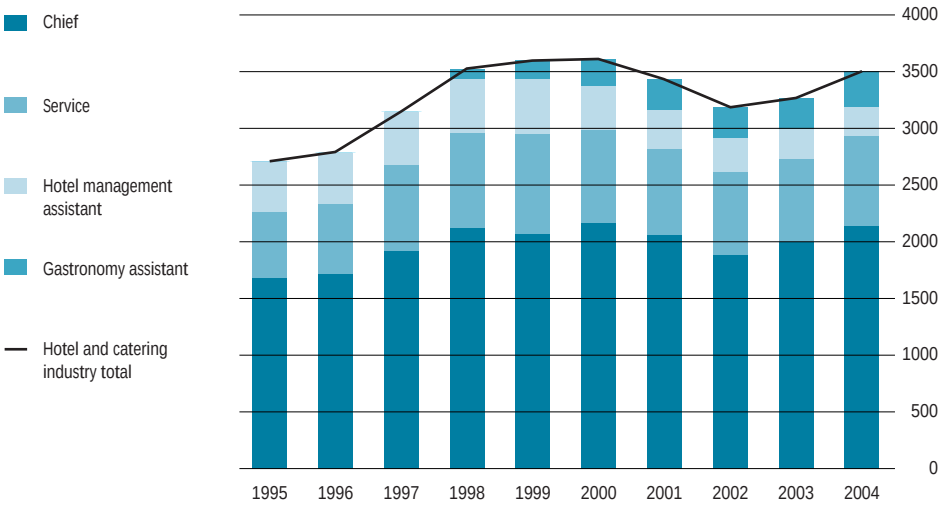
Based on employment figures from the Federal office of Statistics, the fourth quarter of 2004 showed a slight increase of 0.5%, from 215000 to 216000, in the number of hotel and catering industry employees in comparison to the same quarter of the previous year. There was also a large adjustment in the percentage of part-time and full-time jobs. This development shows that the unsatisfactory economic situation and great fluctuation in business flow are increasingly forcing hotel and catering establishments to hire part-time rather than full-time staff.

The number of full-time jobs has dropped relatively sharply by 4200 (–2.8%) units. In contrast, the percentage of both categories of part-time employees has more or less sharply increased. The number of part-time employees with a workload of 50 to 89% of normal working hours rose slightly by 500 units or 1.9%, whereas the number of part-time employees with a workload of less than 50% rose considerably by 4700 units or 12.3%. Overall, the deployment of hotel and catering industry employees has reduced less than branch turnover, a development that has a negative effect on the share of labour costs.

The adaptation to the 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 renewed slight rise in the number of part-time jobs, the industry is meeting a widespread wish of a large section of the population and so confirming its position as a modern employer.

Apprentices are dear to our hearts

Trends in concluded apprenticeship contracts according to occupation, 1995 to 2004

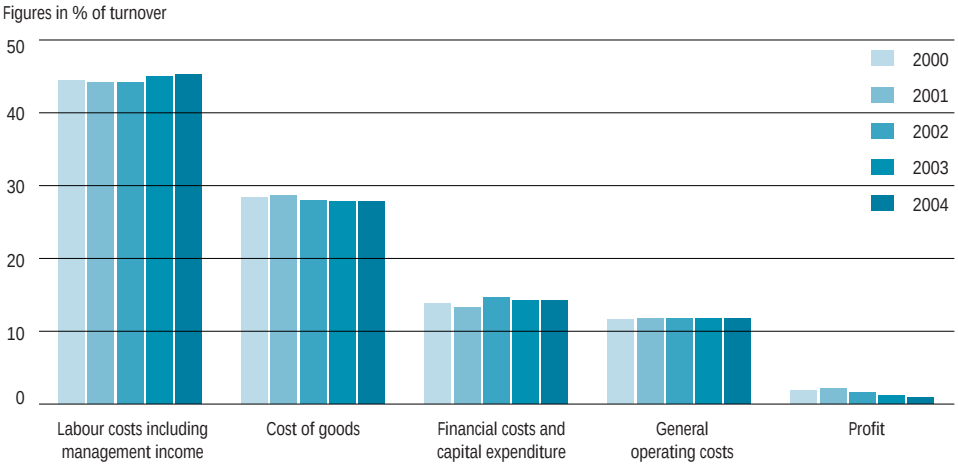


In 2004, the number of apprentices in the hotel and catering industry again increased in comparison to the previous year. In the period from 1995 to 2004 the number of apprenticeship contracts concluded in the industry showed a marked increase in comparison to figures from other branches.

In 2004, the number of newly concluded apprenticeship contracts rose by a total of 236. Development in the different apprenticeship categories was varied: while more contracts were concluded in comparison to the previous year in the categories of gastronomy assistant (+43), service (+52) and, above all, chef (+144), slightly fewer hotel management assistants are today being trained (–3). Around 8000 apprentices are currently undergoing training in the hotel and catering industry.

Labour costs: the major cost factor

Cost structure since 2000 (average of all restaurants participating in survey)



A look at the long-term cost structure development shows that the percentage of labour costs has increased slightly over the last five years (+0.9%). After a slight reduction in 2001 and 2002, labour costs have again risen rather sharply in the last two years. After last year's evaluation showed that the percentage of labour costs had risen relatively sharply, while the percentage of employers' salaries had dropped slightly, evaluation of the year under review shows that both percentages have increased, however with a slightly lower turnover.

After a slight increase in 2001, the percentage of the cost of goods has again fallen. Today, the percentage of the cost of goods to the selling price is considerably less than 30%, but many guests are too little aware of the facts. They criticise prices because they mistakenly see the difference between the cost of goods and the selling price as the restaurant owner's «earnings». The significance of the far weightier personnel costs is greatly underestimated.

A wide variety of means of transportation

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

Public transport

The public transport route network on railways, roads, lakes and rivers adds up to a total of 25 612 km. 27 300 stopping points are served. A total of 428 million railway and vehicle kilometres are available.

In 2003, 1.92 million passengers made use of a half-fare season ticket, 266 167 persons held a general season ticket valid throughout the country and around 700 000 persons obtained a combined season ticket in one of the 25 regional tariff networks.

One of the densest railway networks in the world

The length of the Swiss railway network is 5270 km. This is made up of 3587 km of normal gauge lines – of which 3123 km are part of the Swiss Federal Railways network – and 1683 km of narrow gauge lines.

Swiss Federal Railways runs around 5600 train services or 326 000 train kilometres each day. Around half of this consists of long distance services (Eurocity, Intercity and express trains, the other half of regional and suburban railway services. In 2004, Swiss Federal Railways carried 253 million passengers. The average journey distance amounted to 50 km per day.

In addition to Swiss Federal Railways, a further 42 railway companies operate in the public transport sector.

The bus, car and postal bus network as a distributor

- 17 local transport companies carried 864 million passengers by tram, trolleybus and bus in the area around the larger agglomerations on 1765 km of routes with 7602 employees.
- 258 million passengers were conveyed in buses belonging to 81 companies driven by 7312 drivers on a grand total of 16516 km of regional routes (figures including postal buses).
- 17 regional postal bus centres take care of the nationwide local distribution using postal buses. They are also partners for the transport services provided to order and act as an information point for passengers.

- The 770 postal bus routes operate a route network of 10387 km (around three times the length of the Swiss Federal Railways network).
- 1340 postal bus drivers with 1953 postal buses (75000 seats) conveyed around 100 million passengers. In the course of this, the vehicles covered a distance of 89 million kilometres, or the equivalent of five times the circumference of the earth each day.
- In addition, around 1300 drivers are employed by postal bus companies.

Bustling navigation on Swiss lakes

Twenty-seven shipping companies on a total of 24 lakes and rivers publish schedules in the official timetable. Ships operate in the following categories:

Steamers	15 ships	on 6 lakes
Diesel-electric paddle ships	3 ships	on one lake
Motor ships	154 ships	on 24 lakes and rivers
Solar-electric ships	3 ships	on 2 lakes
Ferries	11 ships	on 5 lakes
Barges	6 ships	on 4 lakes

A total of 46493 seats is available on this total of 204 ships. In 2004, 11893000 passengers were carried by the 15 most important shipping companies, operated by 141 ships which cover 2268000 km a year. The number of passengers fluctuates greatly according to the weather; in 2003, with its very fine summer, the figure was 12055000 passengers.

Over 27 million air travellers

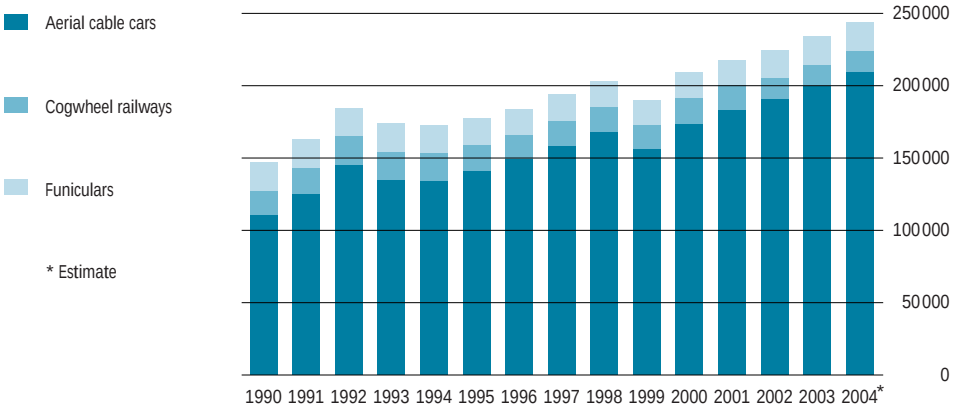
- At the three intercontinental airports of Zurich, Geneva and Basle, 397572 take-offs and landings with approx. 28.2 million passengers were registered in 2004, some 89% of whom used regular scheduled airlines.
- Approximately 35% of visitors to Switzerland arrive by plane.
- 48.1% of passengers at Swiss airports travel on Swiss airlines.
- The SWISS International Air Lines flies to 74 destinations in 41 countries.

Mountain railways are important in terms of regional economics

The mountain regions within the Alps are largely dependent on the income generated from tourism. The mountain railways occupy a key position in the tourism value creation chain. They are often the driving force in tourist destinations.

- The mountain railways provide over 4700 full-time posts made up of more than 11000 jobs (full-time and part-time jobs).
- More than 40000 other jobs (full-time positions) in the hotel and supplementary accommodation industries, the retail trade, catering trade and ski schools also depend indirectly on the existence of the mountain railways.
- The mountain railways generate a direct gross value added of approximately CHF 380 million/year. If the indirect value-added effects of the mountain railways is added to this figure, the gross value added per year rises to approx. CHF 2 billion.
- The productivity of the mountain railways is high in comparison to other tourist sectors. With an added value per full-time job of 80900 Swiss Francs, the mountain railway sector lies in second place in the tourism industry behind the travel agents and tourist office sector.
- Thanks to the increase in day-trippers, the Swiss mountain railways have reported a growing number of passengers since 1990. A reduction in overnight stays has been observed in the same period.

Number of persons carried by federally licensed mountain railways (in thousands)



Source: Federal Statistical Office, provisional data/estimate: SBS

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

	2000/01	2001/02	2002/03	2003/04
Berne	234262	249330	235479	273203
Grisons	754742	686722	626810	715507
Eastern Switzerland	90564	93221	94435	105745
Vaud	188216	157308	176489	199771
Valais	687657	649402	650601	602422
Western Switzerland	23090	18778	21057	38271
Central Switzerland	126462	113744	122103	127604
Ticino	24965	8812	13730	11798
Total	2129958	1977317	1940703	2074321

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

Cycling in Switzerland

Outstanding results for Cycling in Switzerland: in 2004 cyclists rode approx. 235 million kilometres on the Cycling in Switzerland route network. 170000 travellers en route for several days generated over 570000 overnight stays. Services and good worth a total of CHF 130 million were consumed; travellers en route for several days spent approx. CHF 100 per day and day excursionists approx. CHF 13 per day.

The hotel – number one for overnight stay accommodation

Number of overnight stays of cycle tourists

Hotel	Camping	Youth hostel	Farm	Bed & breakfast	Friends/ Relations	Others	Total
268000	75000	77000	49000	38000	25000	42000	574000

Source: Cycling in Switzerland

Quality label for the Swiss tourism industry

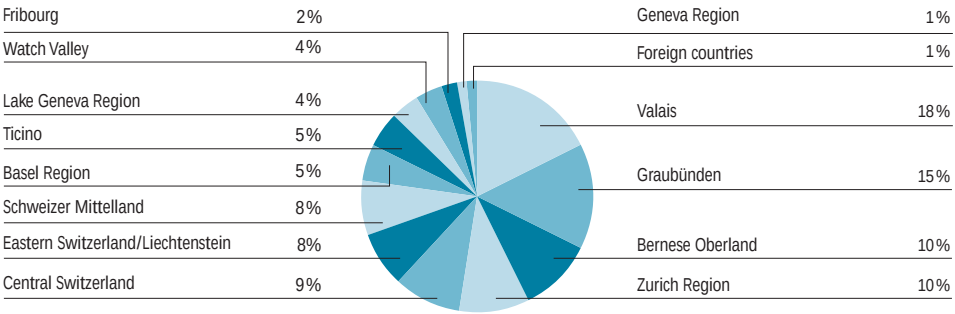
The «Quality Label for Swiss Tourism» programme is supported by all major Swiss tourism associations. Its purpose is to encourage touristic establishments to enhance and safeguard the quality of service in Switzerland.

Q Level I aims for high service quality.

QQ Level II also refers to the quality of management. This level is awarded to companies and providers that have been assessed by external inspectors.

QQQ Level III is given to those companies and providers who have compiled and successfully implemented a comprehensive and internationally recognised Quality Management System (QMS).

Distribution of the label among the Swiss regions (1.5.2005)



Establishments and firms wishing to obtain a quality label should appoint a Quality Representative who is trained as a Quality-Coach (level I), a Quality-Trainer (level II) or a QM System Organisator Tourism (level III). The quality label is only awarded to establishments and companies with trained Coaches or Trainer. 5799 Quality Representatives have been trained in Switzerland up to now.

	1998	1999	2000	2001	2002	2003	2004	Total
Labels awarded								
Level I	175	258	186	347	409	345	387	2107
Level II	74	33	27	64	52	67	61	378
Level III						34	16	50
Quality Representatives								
Q-Coaches	1273	669	495	674	669	498	535	4813
Q-Trainer			227	154	179	123	126	809
QM System Organisator Tourism							19	19

Findings from Travel Market Switzerland

Since 1970, the IDT-HSG Institute for Public Services and Tourism has been conducting surveys on the travel behaviour of Switzerland's resident population at regular intervals. The most recent survey «Travel Market Switzerland 2004» was led again by Prof. Dr. Christian Laesser, who is the contact person for any questions related to this survey (christian.laesser@unisg.ch). The database resulting from Reisemarkt Schweiz 2004 is still the most extensive one on private trips of the resident population of Switzerland to destinations in Switzerland and abroad during 2004 (1.1.–31.12.). Private travel is regarded as all journeys undertaken by a person involving at least one night spent away from his/her place of residence and which were expressly mentioned by the interviewee as not being for business or professional reasons. A basic report can be downloaded for free on www.idt.unisg.ch.

Key data about travel behaviour: travel activity by the Swiss population seems to have flattened out at a high level. 77% of the population travel and of this total 68% make on average 2.53 journeys with a falling trend. A longer-term analysis shows that the net travel intensity for journeys with 4 or more overnight stays is stable at around 70%.

Key data for travel with at least 1+ overnight stay

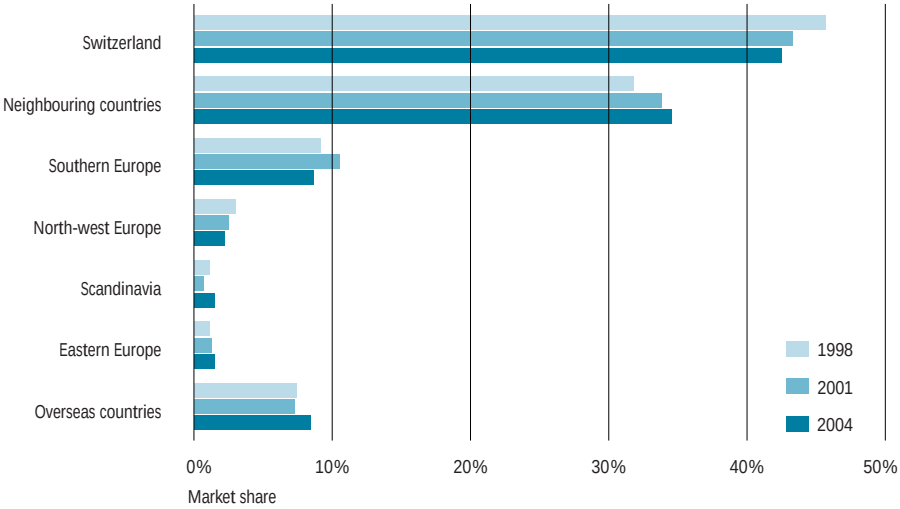
	1995/96	1998	2001	2004
Net travel intensity (share of population with at least one trip)	79%	84%	77%	77%
Proportion of multiple travellers (share of travellers with more than 1 trip)	72%	70%	73%	68%
Gross travel intensity (number of trips per 100 inhabitants)	225	232	218	195
Frequency of travel (number of trips per traveller)	2.85	2.77	2.83	2.53

Net travel intensity (at least 4 overnight stays) – comparison

1990	1992	1995/96	1998	2001	2004
76%	80%	73	71%	69%	70%

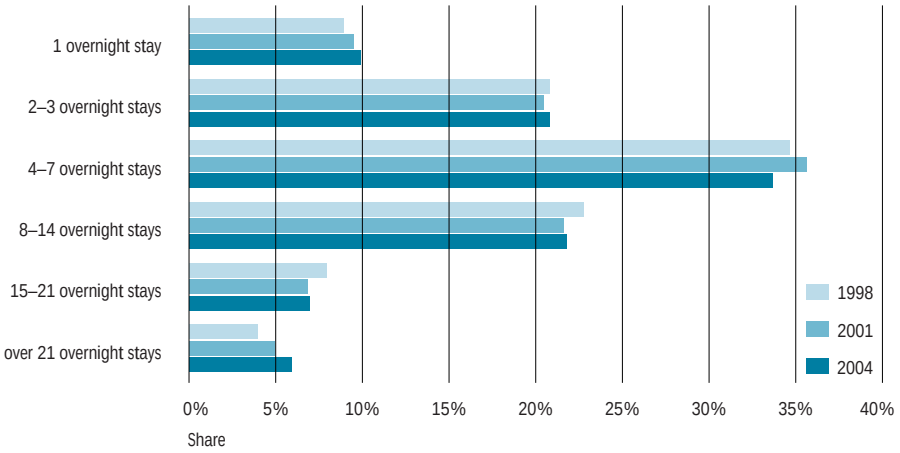
Destinations: The overall choice of destinations has changed little since 1998. Switzerland remains the most popular destination: 43% of all journeys are to destinations in our own country which has, however, experienced a small market share loss (–3%) since 1998. Around 35% of all journeys are to neighbour countries of Switzerland (+3% compared to 1998) with 9% to Southern Europe. The share of overseas destinations remains flat at 8–9%.

Destinations (travel with at least 1 overnight stay)



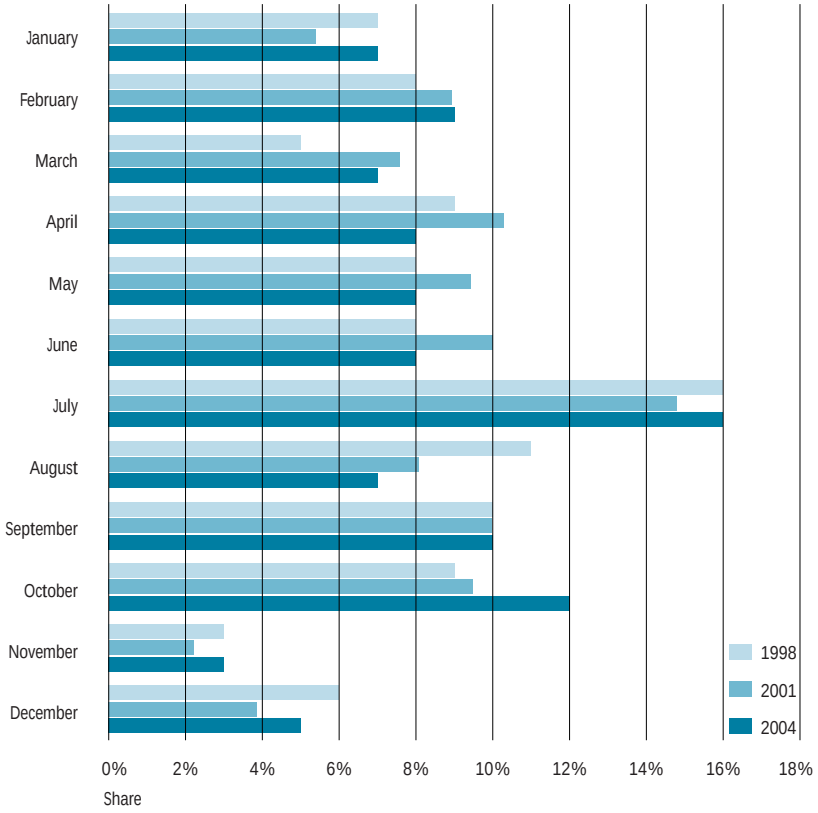
Length of travel: in general, the length of travel is now remaining fairly stable. A three-year comparison shows that very short journeys, and those with over 21 overnight stays, are growing again at the expense of journeys with 4–21 overnight stays. A longer-term analysis also confirms this trend.

Length of travel



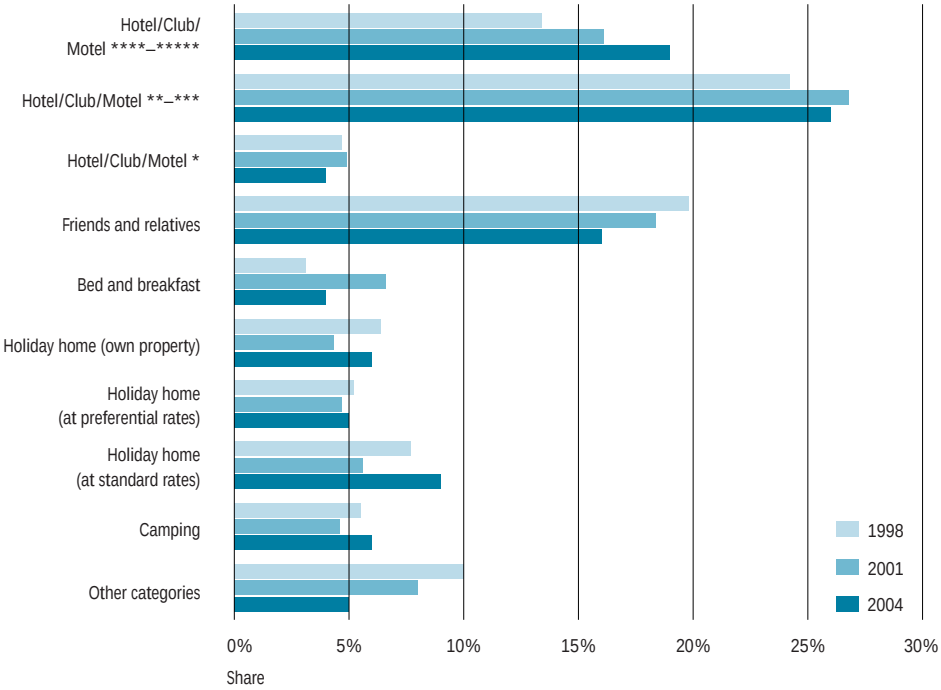
Travel time: the months favoured by the Swiss population for travel in 2004 were July (16%), October (12%), September (10%) and February (9%). Changes in the departure months seem to be explained mainly by meteorological reasons. The effect of a summer with rather worse weather conditions than 2003 is reflected in significant growth of travel activity in the autumn. Overall, and in the longer term, a slight trend away from summer in favour of the spring or autumn as the depature month can be observed.

Departure month/Travel time



Accommodation: Swiss citizens prefer to stay in two and three star hotels (26% of all travel), with friends and relatives (16%) and in holiday homes owned or rented by them (20%). A three-year comparison shows that four and five star hotels have won the biggest market shares and were chosen for 19% of all journeys. Against this, the losers are private accommodation, accommodation of friends and relatives and one star hotels.

Choice of accommodation



Tourism Interest Groups and Professional Associations

- **Association of postgraduated Hoteliers – Restaurateure SHV/Hotelmanager HF-NDS**, Secretariat, Tribschenstrasse 7, 6005 Lucerne, phone +41 (0)41 368 10 08, fax +41 (0)41 368 10 09, www.vdh.ch, welcome@vdh.ch. Networking, further education and friendship care of students from postdiplom of «Unternehmensführung resp. Nachdiplomstudium HF-NDS» of hotelleriesuisse.
- **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**, Mythenquai 333, 8038 Zurich, phone +41 (0)43 243 16 57, fax +41 (0)43 243 16 58, www.vssu.ch. Established: 1898. Tasks: Promotion of navigation on Swiss rivers and lakes, safeguarding the interests of the 16 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**, Sonnenweg 3, 4144 Arlesheim, Tel. 061 702 21 51, Fax 061 703 96 76, www.bnb.ch, dorette.provoost@bnb.ch. Founded in 1999. Association of swiss BnB host families. Purpose: information, promotion, publication of the «Bed and Breakfast Switzerland Guide», quality standards.
- **Community of interest (directors) of the Higher Schools of Tourism Management Switzerland**, c/o IST AG, Josefstrasse 59, 8005 Zurich, phone +41 (0)44 440 30 90, fax +41 (0)44 271 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.
- **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, 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.
- **fit – Frauen im Tourismus**, c/o STF, Finkenhubelweg 11, P.O.Box 8275, 3001 Berne, phone +41 (0)76 473 83 35, www.f-i-t.ch, info@f-i-t.ch. A women's network

for women in tourism. It was started in 1995. Its mission: The fit association interlinks women working in all areas of tourism. It acts as organizers for the exchange of technical information and personnel for women in tourism and promotes equality within the profession.

- **GastroSuisse**, Blumenfeldstrasse 20, P.O.Box, 8046 Zurich, phone +41 (0)848 377 111, fax +41 (0)848 377 112, 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 and four specialist groupes belong to Switzerland's largest employer's association in the hotel and catering industry.
- **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.hotelleriesuisse.ch, info@hotelleriesuisse.ch. Established in 1882. National association of the leading and classified hotels in Switzerland. Support of members in entrepreneurial and professional matters, representation of interests, shaping and influencing the political and economic environment of the hotel trade.
- **Hotel & Gastro Union**, Adligenswilerstrasse 29/22, P.O.Box 4870, 6002 Lucerne, phone +41 (0)41 418 22 22, fax +41 (0)41 412 03 72, www.GastroLine.ch, info@hotelgastrounion.ch. Established in 1886. Objective: Union of employees, professionals and management staff of the hotel/restaurant trade. 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 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)44 201 67 77, fax +41 (0)44 201 68 77, www.cafetier.ch, info@cafetier.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.
- **swissApartments (swap)**, c/o STF, Finkenhubelweg 11, P.O.Box 8275, 3001 Berne, phone +41 (0)55 422 01 25, www.swissapartments.ch, info@swissapartments.ch. Federation of classified holiday home owners. Its mission is to represent the interests of its members and offer an optimized organizational framework. swap compiles holiday home offers at national level and markets them at both national and international levels.
- **swisscamps**, Swiss Camping Association, Bahnhofstrasse 5, 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)44 288 12 84, fax +41 (0)44 288 12 07, www.MySwitzerland.com, stephan.bernhard@switzerland.com. Group of 26 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)44 487 30 50, fax +41 (0)44 480 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)**, Route Cantonale 51, 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. 9 regions.
- **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.
- **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)**, Im Bahnhof, Zürcherstrasse 49, 8903 Birmensdorf, phone +41 (0)44 439 60 66, fax +41 (0)44 439 60 67, www.star.ch, main@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)44 360 14 14, fax +41 (0)44 360 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)44 288 12 71, fax +41 (0)44 201 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.**, 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, mail@stc.ch. Information and booking: +41 (0)848 858 757. 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 Istituto di Management Turistico, Viale S.Franscini 32, 6501 Bellinzona, phone +41 (0)91 814 65 75, fax +41 (0)91 814 65 79, 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.
- **Touring Club 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 convalscent 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)44 209 16 16, fax +41 (0)44 209 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)44 288 11 11, fax +41 (0)44 288 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

- **State Secretariat for Economic Affairs (seco)**, Tourism, Belpstrasse 18, 3003 Berne, phone +41 (0)31 322 27 58, fax +41 (0)31 323 12 12, www.seco.admin.ch. Established in 1935. Objective: Central Federal authority for national and international tourism policies.

• **Swiss Federal Statistical Office**, Tourism Division, Espace de l'Europe 10, 2010 Neuchâtel, phone +41 (0)32 713 65 73, fax +41 (0)32 713 62 15, 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, camping places and youth hostels, 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), Schanzeneckstrasse 1, P.O.Box 8573, 3001 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)**, Ecole des HEC, 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@unil.ch. Established in 1992. Consolidation course «Tourism» for bachelor and master. Basic research, expert opinion activity.

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.