

Swiss Tourism in Figures Edition 2008

STV FST
Schweizer Tourismus-Verband
Fédération suisse du tourisme
Federazione svizzera del turismo
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Contents

Legal bases	3
Tourist regions	5
Tourism – an important sector of the economy	6
Jobs and employees	11
Mobility in Switzerland — results on travel behaviour	13
Hotel and catering industry	15
Accommodation sector	16
Catering	29
Outgoing	33
Transport	34
Sports	37
Formal education	38
Quality label for the Swiss tourism industry	40
International	41
Tourism associations and institutes	43

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Legal bases

Legal bases of the Federal Government

National Promotion of Tourism: Bundesgesetz vom 21. Dezember 1955 über die Schweizerische Verkehrszentrale, ab 1995 Schweiz Tourismus (SR 935.21)

Promotion of Innovation and Cooperation: Bundesgesetz vom 10. Oktober 1997 über die Förderung von Innovation und Zusammenarbeit im Tourismus (SR 935.22)

Promotion of the Lodging Industry: Bundesgesetz vom 20. Juni 2003 über die Förderung der Beherbergungswirtschaft (SR 935.12)

Regional Policy: Bundesgesetz vom 6. Oktober 2006 über die Regionalpolitik (Stand 1. Januar 2008); (SR 901.0)

Gambling Facilities: Bundesgesetz vom 18. Dezember 1998 über Glücksspiele und Spielbanken (Spielbankengesetz, SBG) (SR 935.52)

Exclusiv VAT Tariff for Lodgin Services: Bundesgesetz vom 2. September 1999 über die Mehrwertsteuer (Mehrwertsteuergesetz, MWSTG) (SR 641.20)

Tourism Statistics: Verordnung vom 30. Juni 1993 über die Durchführung von statistischen Erhebungen des Bundes (SR 431.012.1)

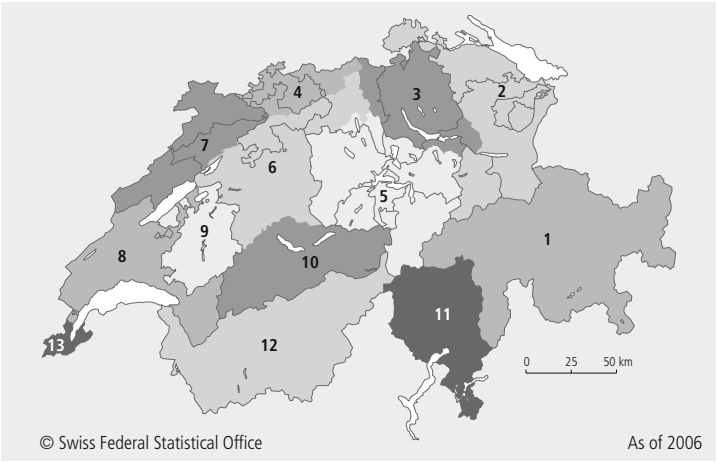
Natural Parks: Bundesgesetz über den Natur- und Heimatschutz (NHG), vom 1. Juli 1966 (SR 451)

Source: www.admin.ch

Overview of tourism laws of the Swiss Cantons

Canton	Internet	Law
Aargau	www.ag.ch	No tourism law
Appenzell Innerrhoden	www.ai.ch	Tourismusförderungsgesetz vom 25. April 1999
Appenzell Ausserrhoden	www.ar.ch	Tourismusgesetz vom 22. September 2003
Basel-Landschaft	www.bl.ch	Tourismusgesetz vom 19. Juni 2003
Basel-Stadt	www.bs.ch	Standortförderungsgesetz vom 29. Juni 2006
Bern	www.be.ch	Tourismusentwicklungsgesetz vom 20. Juni 2005
Fribourg	www.fr.ch	Tourismusgesetz vom 13. Oktober 2005
Geneva	www.ge.ch	Tourismusgesetz vom 24. Juni 1993
Glarus	www.gl.ch	Tourismusentwicklungsgesetz vom 6. Mai 2007
Graubünden	www.gr.ch	Wirtschaftsentwicklungsgesetz vom 11. Februar 2004
Jura	www.ju.ch	Tourismusgesetz vom 31. Mai 1990
Lucerne	www.lu.ch	Tourismusgesetz vom 30. Januar 1996
Neuchâtel	www.ne.ch	Tourismusgesetz vom 25. Juni 1986
Nidwalden	www.nw.ch	Fremdenverkehrsgesetz vom 25. April 1971
Obwalden	www.ow.ch	Tourismusgesetz vom 8. Juni 1997
St. Gallen	www.sg.ch	Tourismusgesetz vom 26. November 1995
Schaffhausen	www.sh.ch	Tourismusgesetz vom 2. Dezember 1996
Solothurn	www.so.ch	Wirtschaftsgesetz vom 9. Juni 1996
Schwyz	www.sz.ch	Gesetz über die Wirtschaftsförderung vom 27. November 1986
Thurgau	www.tg.ch	Gastgewerbegesetz vom 26. Juni 1996
Ticino	www.ti.ch	Tourismusgesetz vom 30. November 1998
Uri	www.ur.ch	Verordnung vom 4. April 2004 über die Förderung des Tourismus
Vaud	www.vd.ch	Tourismusgesetz vom 15. September 1999
Valais	www.vs.ch	Tourismusgesetz vom 9. Februar 1996
Zug	www.zg.ch	Tourismusgesetz vom 27. März 2003
Zurich	www.zh.ch	No tourism law

Tourist regions



1 **Graubünden**: Canton of Graubünden
2 **Eastern Switzerland**: Canton of Glarus, Canton of Schaffhausen, Canton of St. Gallen, excluding parts of the See-Gaster district, Canton of Thurgau, Canton of Appenzell-Innerrhoden and Canton of Appenzell-Auserrhoden
3 **Zurich Region**: Canton of Zurich, Canton of Aargau: districts of Baden, parts of the Bremgarten and Zurzach districts, Canton of Schwyz: districts Höfe and March, Canton of St. Gallen: parts of the See-Gaster
4 **Basel Region**: Canton of Basel-Stadt and of Basel-Land, Canton Solothurn: districts Dorneck and Thierstein, Canton Aargau: the Laufenburg and Rheinfelden districts, parts of Zurzach
5 **Central Switzerland**: Cantons of Lucerne, Uri, Schwyz excluding the March and Höfe district, Canton of Aargau: the Kulm and Muri districts, parts of: Lenzburg district, Cantons of Obwalden, Nidwalden and Zug
6 **Schweizer Mittelland**: the Bernese districts of Aarberg, Aarwangen, Berne, Biel, Büren, Burgdorf, Cerlier, Fraubrunnen, Konolfingen, Laupen, Nidau, Schwarzenburg, Seftigen, Signau, Trachselwald and Wangen; from the Canton of Solothurn the districts Gäu, Tal, Bucheggberg, Gösgen, Wasseramt, Lebern, Olten and Solothurn, from the Canton of Aargau the districts Aarau, Brugg, Zofingen, parts of the Bremgarten and Lenzburg districts
7 **Neuchâtel / Jura / Jura Bernois**: Cantons of Neuchâtel, Jura and the Bernese districts Courtelary, Moutier and La Neuveville
8 **Lake Geneva Region (Vaud)**: Canton of Vaud
9 **Fribourg Region:** Canton of Fribourg
10 **Bernese Oberland**: districts of Frutigen, Interlaken, Niedersimmental, Oberhasli, Saanen and Thun
11 **Ticino**: Canton of Ticino
12 **Valais**: Canton of Valais
13 **Geneva**: Canton of Geneva

Tourism generates income

Domestic and international tourism are important factors in the Swiss economy. Of a total revenue of CHF 21.6 billion in 2004, 9.7 billion (or 44.9%) came from domestic tourism. Expenditure by foreign visitors in Switzerland added some CHF 11.9 billion (2.6% of the Gross Domestic Product).

Total tourism revenue	2003	2004	2005	2006	2007
			in billion CHF		
From domestic tourists	9.6	9.7	1)	1)	1)
From foreign tourists (Tourism balance of payments) 2)	11.6	11.9	12.5	13.6	14.6
Total	21.2	21.6	1)	1)	1)
Tourism's share of Swiss Gross Domestic Product	5.1%	4.8%	1)	1)	1)

1) no estimate
2) 2003/04/05: revised figures, 2006/07: provisional figures
Source: Swiss 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. 8.3 percent of Switzerland's export revenue come from tourism.

Export revenue by industry 1)	2003	2004	2005	2006	2007
			in billion CHF		
1. Metal and machine industry	50.9	55.2	58.3	65.0	72.5
2. Chemical industry	45.2	49.6	54.8	63.0	68.8
3. Watchmaking industry	10.2	11.2	12.4	13.7	16.0
4. Tourism (Tourism balance of payments)	11.6	11.9	12.5	13.6	14.6
5. Textile industry	4.2	4.2	4.2	4.4	4.6

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

Tourism, including overnight stays as the major source of income

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		
	in billion CHF			in billion CHF		
	2005[1)]	2006[2)]	2007[2)]	2005[1)]	2006[2)]	2007[2)]
Tourism, including overnight stays	8.2	8.9	9.9	8.3	9.0	9.9
Visitors staying in lodging facilities and with relatives	6.3	6.9	7.8			
Educational & medical stays	1.9	2.0	2.1			
Excursionists, transit visitors, other tourism	2.8	3.0	3.1	2.7	2.5	2.4
Consumption expenditure of border-zone inhabitants including short-term residents (< 4 months)	1.5	1.6	1.7			
Total	12.5	13.6	14.6	11.0	11.6	12.3

1) revised figures 2) provisional figures
Source: Swiss Federal Statistical Office

Average spending per visitor and overnight stay

Overnight tourists	Expenditure 2003 in million 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: Swiss Federal Statistical Office

Distribution of incidentals

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:

Sector	Expenditures 2004
Fuel	CHF 695 million
Tobacco	CHF 137 million
Sweets	CHF 288 million
Souvenirs, handicrafts	CHF 67 million
Taxi fares	CHF 111 million
Inland water transportation	CHF 20 million
Sights or points of interest	CHF 21 million

Source: Swiss Federal Statistical Office

Facts and figures

In Switzerland many industries benefit directly and indirectly from tourism. It ranks fourth in the national export balance and with about 30 000 employees is one of Switzerland's most important small-business sectors.

– 6.2 percent share of gross domestic product GDP (2006) [1)]
– CHF 14.6 billion export revenue generated by foreign guests [2)]
– 72.5 billion overnight stays in hotel and parahotel industry (2007) [3)]
– CHF 28.3 billion tourism gross value added (2006) [1)]

Tourism is the leading economic sector in mountain areas

Tourism is the key growth sector in mountain areas and marginal regions and helps maintain the balance between periphery and centre:

– Grisons: 30 percent of cantonal GDP and 30 percent of total employment (2007) [4)]
– Valais: 25 percent of cantonal GDP and 27 percent of total employment (2002) [5)]

Tourism shapes Switzerland's image abroad

Studies show that Switzerland is a well-known brand:

– «Swissness» is a purchase-relevant factor abroad
– The Switzerland brand is associated with positive contents around the world, especially with nature and natural beauty

Tourism creates jobs

Tourism is an important employer in urban and rural areas and fulfills its responsibility as a provider of apprenticeship positions. Tourism jobs are non-relocatable.

– 335 000 full-time equivalents – direct and indirect employment (2007) [6)]
– 10 percent of total employment in Switzerland

Quality as a competitive advantage

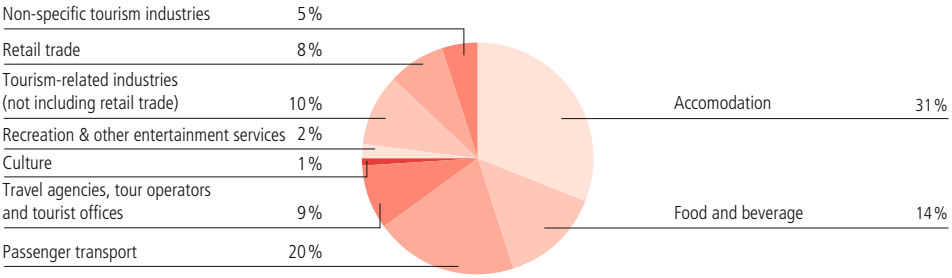
The Quality Label for Swiss Tourism (Q) is a joint industry program to enhance the quality of service. Currently labeled businesses per stage (per 31.12.2007):
Q1: 1158, Q2: 257, Q3: 195

1) The Travel & Tourism Competitiveness Report 2007, WEF 2007, 2) Swiss Federal Statistical Office, 3) Estimate Switzerland Tourism, 4) Der Tourismus im Kanton Graubünden. Wertschöpfungsstudie, HTW Chur 2007, 5) Volkswirtschaftliche Bedeutung des Tourismus im Kanton Wallis, Berwert, A.; Rütter H.; Müller. H., 2002, 6) Employment statistic, Swiss Federal Statistical Office

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

Accounting for 31 percent 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 percent 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



Source: Swiss Federal Statistical Office

Foreign tourists accounted for 47 percent of tourist expenditure in 1998

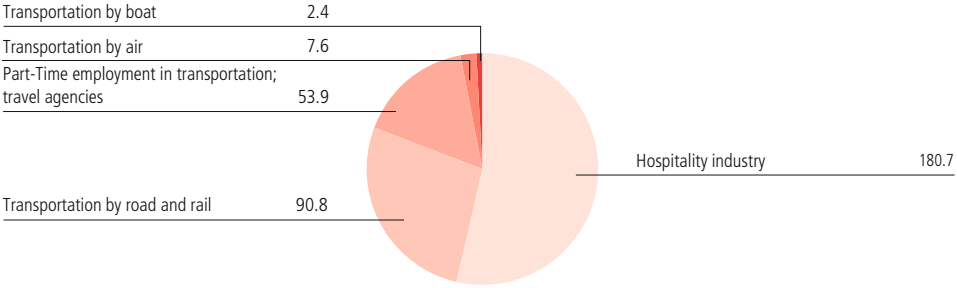
	million CHF	%
Tourism consumption	30 610	100
International visitors	14 500	47
Same-day visitors	3 120	10
Tourists (overnight visitors)	11 380	37
Domestic visitors	9 790	32
Same-day visitors	4 890	16
Tourists (overnight visitors)	4 900	16
Domestic business trips	1 790	6
Use of second homes on own account or free of charge	690	2
Other components	3 840	13

Source: Swiss Federal Statistical Office

Tourism creates jobs

Tourism is an important work provider. Roughly one in 10 employed people has, directly or indirectly, this sector to thank for their job. Hotel and catering alone occupied around 224 000 people in 2007, corresponding to an equivalent 180 700 full-time positions.

Employment in tourism according to individual business sectors 2007 (in thousands)[1)]



Approximate equivalent of 335 000 full-time positions

1) Average over four quarters
Source: Swiss Federal Statistical Office

Full-time equivalents according to economic sectors

(in thousands) [1)]

		2002	2003	2004	2005	2006	2007
Service industry	Total	2175.3	2166.2	2177.0	2180.1	2206.2	2262.7
	Men	1212.6	1201.0	1202.0	1204.6	1209.9	1233.6
	Women	962.7	965.1	974.9	975.5	996.3	1029.1
Hospitality industry	Total	190.4	182.9	180.9	177.3	176.9	180.7
	Men	93.3	90.4	87.8	84.8	83.6	85.3
	Women	97.0	92.5	93.2	92.5	93.4	95.4
Transportation by road	Total	85.3	85.5	85.8	88.1	89.1	90.8
and rail	Men	75.9	75.6	75.7	77.4	77.8	79.7
	Women	9.4	9.9	10.1	10.6	11.3	11.1
Transportation by boat	Total	2.1	2.5	2.5	2.4	2.4	2.4
	Men	1.6	1.9	1.8	1.7	1.7	1.7
	Women	0.5	0.6	0.7	0.7	0.7	0.7
Transportation by air	Total	10.6	9.9	8.6	7.3	7.0	7.6
	Men	5.7	5.4	4.8	4.2	4.0	4.2
	Women	4.9	4.5	3.7	3.1	3.1	3.4
Part-time employment	Total	51.6	51.4	53.4	53.4	52.6	53.9
in transportation;	Men	33.7	33.3	34.9	35.0	35.0	35.5
travel agencies	Women	17.9	18.1	18.5	18.3	17.6	18.4

1) Average over four quarters. Source: Employment statistic, Swiss Federal Statistical Office

Employment statistics: hotel and catering industry

(in thousands)

	2006	2007	2007	2007	2007
	4th quarter	1th quarter	2th quarter	3th quarter	4th quarter
Full-time employees (90% and over)	143.0	144.9	148.3	149.5	150.2
Of which men	75.9	76.7	77.6	77.4	79.2
Of which women	67.1	68.2	70.7	72.1	71.0
Part-time employees I (50-89%)	33.3	33.8	36.0	35.6	34.0
Part-time employees II (<50%)	41.4	38.3	41.2	41.8	43.7
Of which men	18.5	17.1	18.7	18.1	18.6
Of which women	56.1	55.0	58.5	59.3	59.1
Total number of employees (overall)	217.7	217.0	225.5	227.0	227.9
Of which men	94.4	93.8	96.3	95.5	97.8
Of which women	123.2	123.3	129.2	131.4	130.1

Source: Employment statistic, Swiss Federal Statistical Office

Travel with overnight stays

Frequency, duration, distance

Journeys with one or more overnight stays are on average the longest trips and hence account for a significant share of annual mobility. Distance figures are based on round trips and distances at the destination. The total distance amounts to approximately 4600 kilometres per person and year.

55% of those surveyed have taken at least one trip with an overnight stay over the past 4 months. This corresponds to an average of 2.7 journeys per year, with approximately one in nine as a business trip.

Senior citizens take significantly fewer trips with overnight stays than the rest of the population. People in the 26–45 year age bracket cover the longest distances. Income as a key factor is even stronger for journeys with overnight stays than for day trips: For example, the group with a monthly income of between 8000 and 12 000 Swiss Francs travels about twice as much and almost three times as far as those with incomes below 4000 Swiss Francs.

	Number of journeys per year	thereof business trips (in %)	Total distance per year (km)	at least one journey over the past 4 months (share in %)
Age				
6–17 years	2.9	0.2	3775	61.2
18–25 years	2.6	3.6	4576	54.8
26–45 years	3.3	17.1	5857	60.4
45–65 years	2.6	13.7	4919	55.5
66 and over	1.5	0.7	2475	35.3
Gender				
Men	2.8	16.2	5013	57.1
Women	2.5	4.7	4267	52.4
Household income				
Up to CHF 4000	1.6	3.5	2362	36.3
CHF 4001–8000	2.6	7.4	4097	55.7
CHF 8001–12 000	3.6	11.9	6778	69.8
Over CHF 12 000	4.4	24.2	8758	73.6
Spacial structure (residential community)				
Suburban core community	2.9	11.3	4881	56.0
Other suburban community	2.8	10.7	5389	57.1
Isolated town	1.4	12.3	1811	34.5
Rural community	2.4	10.2	3105	49.8
Total	2.7	10.7	4639	54.8

Source: Microcensus 2005, Swiss Federal Statistical Office

Objectives, purposes and choice of transport

Around half of all journeys with overnight stays are taken abroad. Naturally, this share is higher for business trips as longer domestic business trips often do not require an overnight stay.

Among domestic destinations the classic holiday regions are most popular, namely Eastern Switzerland (with Graubünden), Schweizer Mittelland (including Berne and others) and the Lake Geneva Region (including Valais). However, Ticino and Central Switzerland are also often chosen as destinations, given the fact that these regions are notably smaller than the other major regions.

Destination by travel purpose

(in %)

	Leisure	Business	Other	Total	Share of population major regions
Lake Geneva Region (incl. Valais)	10.6	7.1	10.2	10.2	18.4
Schweizer Mittelland (incl. Berne)	10.5	7.9	10.3	10.2	22.8
Northwestern Switzerland	2.2	3.1	1.6	2.2	13.7
Zurich Region	3.1	6.2	2.3	3.4	17.0
Eastern Switzerland (incl. Graubünden)	12.6	9.2	18.8	12.8	14.3
Central Switzerland	4.5	4.7	6.7	4.7	9.5
Ticino	5.8	5.0	2.8	5.4	4.3
Switzerland	49.3	43.2	52.7	49.0	100.0

Reasons for choice of transport

(in %, multiple answers possible)

Main means of transport	Aeroplane	On foot/ by bycicle	Motorised privat transport	Public transport	Other
Lack of alternatives	57.1	24.8	43.4	41.6	36.2
Travel time	88.2	20.2	68.7	44.6	43.7
Costs	32.1	15.4	29.4	36.7	35.7
Perceived safety	21.7	5.0	16.5	36.9	32.2
Pleasure	47.5	69.3	48.6	65.2	70.7
Higher reliability	33.9	15.0	36.1	37.7	38.1
Luggage, bulky items	30.3	11.8	71.2	23.5	50.4

Source: Microcensus 2005 on Travel Behaviour, Swiss Federal Statistical Office

The Swiss hotel and restaurant industry: the most important industry in tourism

228 000	employees
9 000	trainees
28 000	hotel and restaurant establishments
24	billion francs annual turnover
851	million francs paid in VAT or
10.5	per cent of the overall net VAT receivables

The hotel and restaurant establishments are an important element of the Swiss economy. Some 228 000 people are employed in the hotel and restaurant industry. This is slightly less than 10 per cent of all people employed in the service sector. Some 9000 trainees are also employed in the hotel and restaurant industry.

The aforementioned figures do not include the fact that the hotel and restaurant industry and therefore the economy of tourism also indirectly generate many jobs in other sectors such as, for instance, the construction industry, in agriculture and in specialist retail. For instance, around half of the meat in Switzerland is consumed in the catering industry. This means that jobs are created in both agriculture and the butchery business.

The 2005 census of establishments counted some 28 000 hotel and restaurant establishments. Of these, 67.3 per cent were restaurants, 15.1 per cent hotels with restaurants, 6.4 per cent bars, 3.5 per cent canteens and 1.7 per cent hotels without a restaurant. Together, these hotel and restaurant establishments generated an annual turnover of CHF 24 billion.

According to the Federal tax administration (FTA), the hotel and restaurant industry also makes a substantial contribution to VAT revenues. In 2005, the hotel and restaurant industry paid CHF 851 million in VAT. The approx. 27 000 restaurants and hotels liable for tax thus contributed 10.5 per cent of the overall VAT of the FTA volume of CHF 8.1 billion.

Source: Industry Report 2008, GastroSuisse

Overview of the accommodation sector

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

Hotel accommodation
Hotels, boarding houses, guesthouses, motels

Health establishments
Sanatoria which are not subsidized by the Canton and convalescent homes with medical management or support, Alpine health establishments, altitude clinics, rheumatic clinics, public spas

Supplementary accommodation
Private rooms (vacation homes and apartments):
These are properties which are offered for rental to third parties. They exclude properties which are solely occupied by the owners or long-term tenants, or their family members.
Camp and caravan sites:
Demarcated sites which are accessible to everyone for the temporary parking of caravans and motor homes in which they travel, and for the temporary erection of tents. One «parking place» is equivalent to three «sleeping places» on average (four in the Ticino).
Group accommodation:
Dormitories for tourists and groups, club and association houses, mountain refuges and huts.
Youth hostels:
Switzerland's official youth hostels.

Accommodation statistics (HESTA) for hotels and health establishments replace the statistics for hotels and health establishments which date back to 1934 but which were discontinued in 2003 due to budget restrictions. In methodological terms, these figures cannot be compared to the old statistics; HESTA has been in operation since 1.1.2005.

Hotels and health establishments

Overnight stays in the Swiss hotel and wellness establishments amounted to 36.4 million (+4.4%) in the year 2007, and are associated with 15.6 million (+5.5%) arrivals. Thus the length of stay amounts to 2.3 nights (compared to 2.4 nights in the previous year). On average, with 2.5 nights, foreign guests remained longer in Swiss hotels and wellness establishments as compared to Swiss visitors with 2.1 nights. In the year 2007, 57.4 percent of overnight stays were on account of foreign visitors. These came chiefly from Germany (16.7% of aggregate demand), the United Kingdom (6.3%), the United States (4.6%), France (3.8%) and Italy (3.1%). All named countries increased their numbers in overnight stays as compared to 2006, although to greatly varying extents. Viewed as continents, the demand from Europe and Switzerland was the most significant (85.7%, including Switzerland), followed by Asia (6.3%) and America (6.1%). Guests from Africa and Oceania made up less than 1 percent of the aggregate demand.

In the year 2007 the tourism regions Graubünden, Zurich, Valaise, Bernese Oberland and Central Switzerland were the most visited, each with at least 3.7 million visitors – and united together, they account for approximately 62 percent of all overnight stays. Expressed as a percentage the regions Geneva (+8.5%) and Zurich (+7.7%) grew the most strongly.

Development of overnight stays in 2007

Change in percent compared to the same period in 2006

	Total	Foreigners	Swiss
January	1.7	5.4	–2.9
February	2.5	4.5	0.1
March	3.8	5.6	1.5
April	4.7	7.1	1.4
May	2.5	4.4	0.0
June	6.0	9.1	1.5
July	4.6	7.8	0.3
August	4.0	5.5	1.9
September	2.0	3.5	0.2
October	5.2	6.0	4.5
November	10.3	12.3	8.0
December	8.5	9.7	6.9
Entire year	4.4	6.5	1.6

Source: Swiss Federal Statistical Office

Overnight stays by country of residence of visitors
(in millions)

Country of residence of visitors	Year 2007	Winter 06/07	Summer 07
Switzerland	15.4	6.8	8.6
Total of foreign countries	20.9	9.1	11.6
Germany	6.1	2.7	3.3
United Kingdom [1]	2.3	1.1	1.2
France	1.4	0.7	0.7
Italy	1.1	0.5	0.6
Netherlands	0.9	0.4	0.5
Belgium	0.8	0.4	0.4
Nordic countries [2]	0.5	0.3	0.3
Russia	0.4	0.2	0.1
Spain	0.4	0.2	0.3
Austria	0.4	0.2	0.2
Other countries Europe	1.5	0.7	0.7
Europe total (excl. Switzerland)	15.8	7.4	8.3
United States	1.7	0.6	1.1
Canada	0.2	0.1	0.1
Brazil	0.1	0.1	0.1
Other countries America	0.2	0.1	0.1
America total	2.2	0.8	1.4
Japan	0.6	0.1	0.4
China (incl. Hongkong)	0.3	0.1	0.2
Korea	0.2	0.1	0.1
Israel	0.2	0.1	0.1
India	0.3	0.1	0.3
Other countries Asia	0.8	0.3	0.5
Asia total	2.3	0.7	1.6
Africa	0.3	0.1	0.2
Australia, Oceania	0.3	0.1	0.2
Other overseas countries	0.6	0.2	0.3
Total	36.4	15.8	20.2

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

Hotel industry: capacity, overnight stays and occupancy rate
Cantons 2007

Cantons	Capacity [1]		Overnight stays in millions			Occupancy rate [2] in %	
	Rooms	Beds	Swiss	Foreigners	Total	Rooms	Beds
Graubünden	19 103	38 310	2.9	2.9	5.9	54.5	46.3
Bern	17 591	34 361	2.2	2.8	5.0	51.1	42.5
Valais	14 463	29 383	2.0	2.4	4.4	51.2	44.6
Zurich	12 221	20 473	1.2	3.0	4.1	69.5	56.0
Geneva	8 821	14 552	0.6	2.3	2.9	67.6	54.5
Ticino	9 466	18 315	1.5	1.3	2.8	49.9	42.8
Vaud	9 286	17 389	0.9	1.6	2.5	52.7	41.9
Lucerne	5 663	10 766	0.6	1.1	1.7	55.5	45.4
St. Gallen	5 094	9 225	0.6	0.5	1.1	42.1	33.4
Basel-Stadt	3 213	5 081	0.3	0.7	0.9	65.5	51.7
Aargau	3 159	5 232	0.4	0.4	0.7	47.9	38.4
Obwalden	2 174	4 173	0.3	0.4	0.6	50.6	43.9
Schwyz	2 566	5 043	0.4	0.2	0.6	42.6	35.9
Thurgau	1 931	3 424	0.2	0.2	0.4	42.2	32.9
Fribourg	2 022	4 146	0.2	0.2	0.4	36.4	26.7
Solothurn	1 614	2 901	0.2	0.2	0.4	46.4	35.8
Zug	971	1 530	0.1	0.1	0.3	60.7	48.6
Uri	1 351	2 738	0.1	0.2	0.3	35.8	28.0
Nidwalden	967	1 982	0.1	0.1	0.2	42.6	33.7
Neuchâtel	1 231	2 368	0.1	0.1	0.2	37.4	27.8
Basel-Landschaft	1 105	2 011	0.1	0.1	0.2	41.0	30.1
Appenzell Innerrhoden	601	1 707	0.1	0.0	0.2	42.4	29.5
Appenzell Ausserrhoden	998	1 708	0.1	0.0	0.1	31.0	25.1
Glarus	758	1 587	0.1	0.0	0.1	31.5	25.5
Schaffhausen	596	1 114	0.1	0.1	0.1	40.9	31.2
Jura	746	1 499	0.1	0.0	0.1	18.7	15.6
Switzerland	127 710	241 019	15.4	20.9	36.4	53.3	43.6

Sorted by overnight stays 2007, in decreasing order
1) Monthly weighted and only open establishments (available rooms and beds)
2) Number of recorded overnight stays in percent of the total monthly net capacity
Source: Swiss Federal Statistical Office

Tourist regions 2007

Tourist regions	Capacity [1]		Overnight stays in millions			Occupancy rate [2] in %	
	Rooms	Beds	Swiss	Foreigners	Total	Rooms	Beds
Graubünden	19 103	38 310	2.9	2.9	5.9	0.5	0.5
Zurich Region	14 167	23 828	1.4	3.2	4.6	0.7	0.5
Valais	14 463	29 383	2.0	2.4	4.4	0.5	0.4
Bernese Oberland	12 365	24 988	1.6	2.1	3.8	0.5	0.4
Central Switzerland	13 536	25 990	1.6	2.1	3.7	0.5	0.4
Geneva	8 821	14 552	0.6	2.3	2.9	0.7	0.5
Ticino	9 466	18 315	1.5	1.3	2.8	0.5	0.4
Lake Geneva Region (Vaud)	9 286	17 389	0.9	1.6	2.5	0.5	0.4
Eastern Switzerland	9 712	18 228	1.2	0.8	2.0	0.4	0.3
Schweizer Mittelland	7 290	12 900	0.8	0.9	1.8	0.5	0.4
Basel Region	4 973	8 185	0.4	0.8	1.3	0.6	0.4
Fribourg Region	2 062	4 207	0.2	0.2	0.4	0.4	0.3
Neuchâtel / Jura / Jura bernois	2 466	4 744	0.2	0.1	0.4	0.3	0.2
Switzerland	127 710	241 019	15.4	20.9	36.4	0.5	0.4

Top destinations in 2007

Destinations [3]	Capacity [1]		Overnight stays in millions			Occupancy rate [2] in %	
	Rooms	Beds	Swiss	Foreigners	Total	Rooms	Beds
Zurich	6 942	11 659	0.5	2.0	2.6	74.7	61.0
Geneva	6 192	10 115	0.3	1.7	2.0	69.3	55.3
Zermatt	3 050	5 843	0.5	0.8	1.3	71.9	66.3
Lucerne	2 950	5 483	0.3	0.8	1.1	65.2	54.9
Basel	3 124	4 929	0.3	0.7	0.9	66.8	52.8
Davos	2 786	5 372	0.4	0.5	0.9	60.4	50.5
St. Moritz	2 291	4 269	0.2	0.6	0.8	66.4	58.9
Lausanne	2 140	3 788	0.2	0.5	0.7	66.7	51.1
Bern	1 914	3 277	0.3	0.4	0.7	69.4	56.0
Interlaken	1 541	2 940	0.2	0.5	0.6	69.8	61.1
Lugano	1 683	3 145	0.2	0.4	0.6	60.7	52.4
Grindelwald	1 435	2 974	0.1	0.4	0.5	61.1	52.3
Arosa	1 506	2 770	0.3	0.2	0.5	60.2	55.8
Opfikon	1 355	2 088	0.2	0.3	0.5	79.9	64.8
Lauterbrunnen	1 422	2 914	0.1	0.4	0.5	56.9	51.5
Ascona	1 227	2 277	0.3	0.2	0.5	63.2	59.2

Capacity in hotels and health spas

Year	Recorded Establishments	Recorded Rooms	Recorded Beds	Open Establishments	Available Rooms	Available Beds
2002	5 755	143 218	263 449	–	–	–
2003	5 691	143 148	263 024	–	–	–
2005	5 836	143 796	274 035	4 970	127 409	239 150
2006	5 693	142 514	271 591	4 967	127 527	240 429
2007	5 635	141 596	270 146	4 954	127 710	241 019

Hotels based on star rating system 2007

Year	Open Establishments	Available Rooms	Available Beds	Occupancy rate[2] in % Rooms	Occupancy rate[2] in % Beds	Revpar[4]
*	56	1 706	3 916	60.4	43.1	63.6
**	282	7 025	13 333	53.9	45.1	61.3
***	930	32 547	59 619	58.8	49.7	81.0
****	411	28 696	51 023	65.4	54.6	134.0
*****	76	9 715	16 334	64.7	54.8	326.4
No information	2 867	41 415	83 161	37.5	29.9	37.8
No category	333	6 607	13 633	50.3	41.3	62.7
Total	4 954	127 710	241 019	53.3	43.6	96.1

Hotels and health spas according to size of establishment 2007

Size of establishment	Open Establishments	cumulative	in %	cumulative
0 to 10 beds	845	845	17.1	17.1
11 to 20 beds	1 129	1 974	22.8	39.8
21 to 50 beds	1 654	3 628	33.4	73.2
51 to 100 beds	856	4 484	17.3	90.5
101 to 150 beds	255	4 738	5.1	95.6
151 to 200 beds	96	4 834	1.9	97.6
201 to 300 beds	71	4 905	1.4	99.0
301 and more beds	49	4 954	1.0	100.0

1) Monthly weighted and only open establishments (available rooms and beds)
2) Number of recorded overnight stays in percent of the total monthly net capacity
3) Top 16 destinations based on overnight stays in 2007
4) Revpar = revenue per available room * days open verified by hotelleriesuisse
Source: Swiss Federal Statistical Office

Turnover Distribution and Operating Costs according to hotel category (2006)

The Swiss Hotel Credit Association (SGH) annually publishes average figures for hotels and, in the year 2006, 368 hotels were assessed. The following published figures are based on this assessment and reflect average values. With these figures, it must be taken into account that within the various categories between seasonal and year-round commercial enterprises, as well as between the lakeside and mountain hotel trade; in each case substantial differences are at hand.

Hotel category	* + **	***	****	*****
Number of hotels	69	145	61	13
	%	%	%	%
Earnings on food and beverages	67.6	53.0	46.2	43.9
Earnings on accommodation	30.6	45.1	50.1	48.3
Earnings on other services	1.8	2.0	3.8	7.8
Total turnover	100.0	100.0	100.0	100.0
Direct operating expenses	–24.6	–21.4	–18.5	–16.2
Gross profit I	75.4	78.6	81.5	83.8
Personnel expenses	–34.6	–36.4	–40.5	–40.0
Gross profit II	40.8	42.2	41.1	43.8
Other operating expenses	–13.7	–14.0	–14.5	–15.6
Operating result I	27.1	28.2	26.6	28.2
Management expenses	–11.1	–7.7	–5.1	–4.4
Operating result II	16.0	20.5	21.4	24.0
Maintenance and replacements	–4.3	–4.8	–5.4	–6.8
Gross operating profit	11.8	15.6	16.1	17.3
Financial and investment expenses	–6.5	–7.0	–6.4	–5.7
Operating cashflow	5.3	8.6	9.7	11.3
Non-recurring earnings and expenses	0.9	0.6	2.5	1.1
Corporate cashflow	6.2	9.3	12.2	12.4
Depreciation	–8.2	–9.9	–15.7	–11.0
Corporate result	–2.1	–0.6	–3.6	1.5
Important key figures				
Earnings from food preparation	69.1	63.4	68.9	69.2
Earnings from beverages	62.9	63.4	58.1	73.3
Earnings from merchandise	64.4	59.8	66.6	69.7

Source: Swiss Association for Hotel Credit (Statistical year 2006)

By all figures we are dealing with average values. For this reason, single results cannot be calculated through the addition or subtraction of revenue and expenses.

Important key figures by hotel category

Hotel category	* + **	***	****	*****
Profit and loss account				
Bed occupancy rate in %	29.1	40.6	47.4	41.3
Average duration of stay (days)	3.3	3.0	3.4	3.2
	CHF	CHF	CHF	CHF
Average accommodation rate	65	80	132	239
Accommodation earnings per bed per year	6 582	11 693	22 322	34 064
Average operating income	809 101	1 621 594	4 421 163	13 336 084

Source: Swiss Association for Hotel Credit (Statistical year 2006)

Key balance sheet figures by hotel category

Hotel category	* + **	***	****	*****
Balance sheet				
Current ratio	110.1	134.5	115.8	137.1
	CHF	CHF	CHF	CHF
Indebtedness per bed	40 568	49 716	84 277	119 683
Indebtedness per room	84 941	95 030	159 677	220 742
Investment per bed	41 520	50 860	84 800	132 238
Investment per room	88 045	97 043	159 679	240 506
Average balance sheet total	1 542 659	3 257 202	9340 305	28 699 453

Source: Swiss Association for Hotel Credit (Statistical year 2006)

Level of indebtedness of the hotel industry

Hotel category	* + **	***	****	*****
	%	%	%	%
Equity ratio	10.4	6.9	7	20.4
Debt to equity ratio	89.6	97.3	93.3	79.6
Payable interest in % of long-term debt	3.7	3.7	3.5	3.3

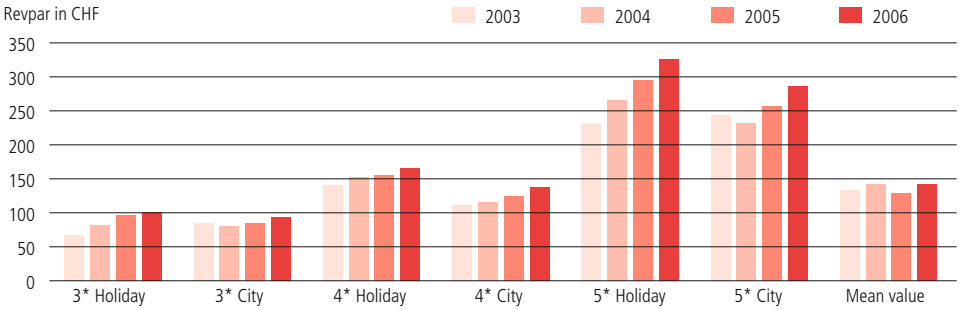
Source: Swiss Association for Hotel Credit (Statistical year 2006)

Facts and Figures from the Experience Groups [Erfa Groups]

The results from the Experience Groups from hotelleriesuisse (around 160 establishments) cannot claim to be representative or complete, but they do provide valuable indications from the segment comprising the leading and larger businesses regarding the progression of the financial year and development over time.

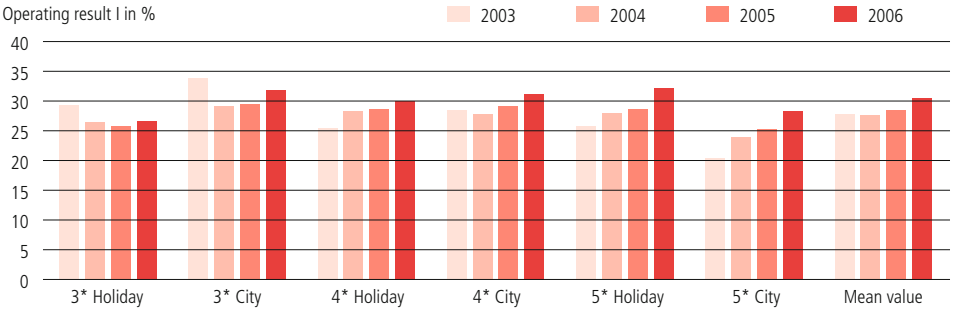
Revpar

The revenue per room and day of opening (revenue per available room) is an informative key figure as regards value-added per available room.



Operating result I

Operating result I is one of the main key figures in the hotel and catering sector, providing a yardstick for management efficiency. It takes account of all operating costs that can be influenced directly and are mostly variable, such as expenditure on goods (incl. services), personnel costs and other direct operating expenditure.



More information is available in the publication: «Erfa-Gruppen von hotelleriesuisse, Zahlen und Fakten 2005/06» which can be obtained from hotelleriesuisse, P.O.Box, 3001 Berne.

Apartments

Number of permanently and part-time occupied apartments

as of census 2000

Canton	Apartments				Canton	Apartments			
	Total	Occupation				Total	Occupation		
		Permanently occupied	Occupied part-time	Un-occupied			Permanently occupied	Occupied part-time	Un-occupied
ZH	598 929	553 003	33 861	12 065	AR	25 063	20 864	2 790	1 409
BE	466 025	404 054	45 623	16 348	AI	6 094	5 102	668	324
LU	152 260	136 406	11 441	4 413	SG	205 840	179 011	18 965	7 864
UR	15 878	12 921	1 978	979	GR	128 987	74 411	47 902	6 674
SZ	55 382	48 035	5 526	1 821	AG	240 092	218 326	13 435	8 331
OW	16 070	11 808	3 606	656	TG	101 446	88 801	7 983	4 662
NW	16 934	14 439	2 113	382	TI	185 173	134 179	45 175	5 819
GL	19 152	14 962	2 916	1 274	VD	324 566	269 992	43 481	11 093
ZG	42 711	38 196	3 979	536	VS	172 705	101 870	61 614	9 221
FR	105 511	91 243	10 454	3 814	NE	81 643	72 091	6 431	3 121
SO	112 054	100 021	6 729	5 304	GE	205 026	177 364	22 912	4 750
BS	106 838	94 155	8 395	4 288	JU	31 041	26 549	2 742	1 750
BL	118 701	109 205	6 489	3 007	CH	3 569 181	3 027 829	419 819	121 533
SH	35 060	30 821	2 611	1 628					

Source: Swiss Federal Statistical Office

Classified vacation homes by regions

as of 31 December 2007

Tourist region	★★★★★	★★★★	★★★	★★	★	Total
Graubünden	44	643	2923	899	79	4588
Estern Switzerland / Lichtenstein	0	22	244	138	9	413
Zurich Region	0	0	1	0	0	1
Central Switzerland	4	58	323	131	9	525
Schweizer Mittelland	0	4	12	10	1	27
Neuchâtel / Jura / Jura Bernois	0	6	87	61	7	161
Lake Geneva Region (Vaud)	0	5	81	77	6	169
Fribourg Region	0	2	24	3	0	29
Bernese Oberland	37	326	1 557	499	46	2 465
Ticino	22	130	592	186	18	948
Valais	132	710	3 524	1 411	92	5 869
Switzerland	239	1 906	9 368	3 415	267	15 195

Source: Swiss Tourism Federation

Agrotourism

Sleep on Straw: overnight stays and establishments

Tourist region	2003	2004	2005	2006	2007
Graubünden	2 130	2 197	2 694	2 958	3 119
Eastern Switzerland	4 973	4 752	5 229	4 398	4 522
Zurich Region	1 387	1 778	1 821	2 174	2 449
Basel Region	2 904	3 042	2 973	3 094	2 749
Central Switzerland	7 021	6 897	7 831	8 645	8 939
Schweizer Mittelland	4 120	4 962	4 617	4 003	4 735
Neuchâtel / Jura / Jura Bernois	3 999	3 756	3 650	3 487	3 054
Lake Geneva Region (Vaud)	1 381	1 509	1 606	1 623	1 868
Fribourg Region	2 586	2 677	2 394	2 322	2 677
Bernese Oberland	2 769	2 472	2 770	3 955	3 315
Ticino	1 033	700	897	843	303
Valais	488	506	643	589	681
Geneva	92	203	90	211	0
Switzerland	34 883	35 524	37 215	38 302	38 411
Number of establishments	221	217	215	200	194

Source: association «schlaf im Stroh!»

Holidays on the Farm: overnight stays and establishments

Tourist region	2003	2004	2005	2006	2007
Graubünden	5 262	4 640	4 262	4 112	5 031
Eastern Switzerland	31 820	32 270	29 223	29 094	25 192
Basel Region	5 712	5 937	4 479	4 954	1 658
Central Switzerland	25 467	23 267	24 990	26 559	26 221
Schweizer Mittelland	22 865	23 670	24 150	21 497	25 044
Westschweiz [1)]	10 210	9 471	8 414	7 791	7 589
Bernese Oberland	2 558	2 632	2 019	1 992	2 207
Ticino	1 264	1 917	2 268	2 244	2 776
Valais	478	1 212	991	1 150	1 020
Zurich Region					6 780
Switzerland	105 636	105 016	100 796	99 393	103 518
Number of establishment	240	230	229	240	230

1) Fribourg Region, Geneva, Lake Geneva Region (Vaud), Neuchâtel/Jura/Jura Bernois combined
Source: reka

Camp sites[1)]

Number of establishments and overnight stays 2007

The Swiss are also among the most frequent campground guests. However, with 52 percent of overall demand their share declined somewhat, compared to the previous year (54%). Guests from Germany and the Netherlands accounted for slightly more overnight stays than last year, each with 34 percent of overall demand (32%), an increase of 73 000 overnight stays. The average length of stay of Swiss guests dropped to 3.8 overnight stays (compared to 4.3 in 2006). On the other hand, the numbers of German and Dutch guests increased, with an average of 4.6 overnight stays in 2007 compared to 4.3 in the previous year. The demand for campsites depends on the weather. In 2007 the month of April was unusually dry and sunny; the number of overnight stays increased by 19 percent compared to the previous month.

Tourist region	Capacity Establish-ments	Campsites			Demand Arrivals in 1000	Overnight stays in 1000	Average duration of stay
		Total	Overnight campsites	Permanently leased campsites			
Graubünden	24	3 862	2 443	1 419	43	169	3.9
Valais	36	6 520	5 136	1 384	69	310	4.5
Bernese Oberland	38	4 447	2 820	1 627	104	346	3.3
Zurich Region	15	2 147	943	1 204	22	72	3.3
Central Switzerland	28	4 204	2 022	2 182	61	163	2.7
Lake Geneva Region (Vaud) and Geneva[1]	26	5 646	2 367	3 279	70	250	3.6
Geneva	2	529	250	279	1)	1)	1)
Eastern Switzerland	29	4 183	1 522	2 661	46	127	2.8
Schweizer Mittelland	13	3 071	1 611	1 460	35	84	2.4
Basel Region	5	435	180	255	(8)	(17)	2.0
Ticino	35	6 343	5 160	1 183	204	1 070	5.2
Fribourg Region	12	2 411	533	1 878	(24)	(63)	2.6
Neuchâtel / Jura / Jura Bernois	16	2 978	1 774	1 204	34	101	2.9
Switzerland	279	46 776	26 761	20 015	720	2 772	3.8

1) Two regions combinded due to data protection (less than 3 establishments in the Geneva tourist region)
() Only of limited statistical reliability (coefficient of variation >15%)
Source: Swiss Federal Statistical Office

Youth hostels

Number of establishments and overnight stays 2007

With 528 000 overnight stays (+4.5%) Swiss guests generated around 58 percent of overall demand. The Germans came in second with 133 000 overnight stays (+9.7%), an increase of 15 percent of overall demand. The share of other European guests amounts to 146 000 overnight stays, up 4.5 percent over the previous year.

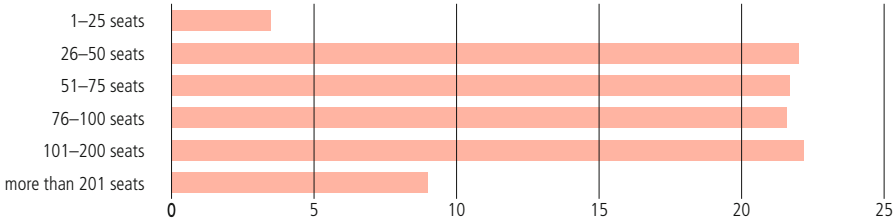
Of the 912 000 overnight stays recorded in youth hostels 461 000 were arrivals. That corresponds to an average length of stay of two nights per person; this value is below the hotel industry (2.3 nights). The length of stay varies according to region: In Graubünden the number was 2.8 nights, Ticino and the Bernese Oberland recorded 2.1 nights each, while Eastern Switzerland and the Swiss Mittelland only recorded 1.6 nights each.

The summer season accounted for nearly two thirds (66%) of overnight stays. Among tourism regions Graubünden led the way with 120 000 overnight stays, followed by the Zurich region with 111 000 and Ticino with 95 000 overnight stays.

Tourist region	Capacity registered Establishments	Registered Beds	Demand Arrivals	Overnight stays	Average duration of stay
Graubünden	9	1 092	42 778	120 108	2.8
Valais	3	341	23 549	52 828	2.2
Bernese Oberland	5	480	27 580	59 111	2.1
Zurich Region	6	647	59 871	111 387	1.9
Central Switzerland	7	640	50 416	87 538	1.7
Lake Geneva (Vaud)	5	613	44 686	86 012	1.9
Geneva	1	334	x	x	x
Eastern Switzerland	7	658	36 235	58 522	1.6
Schweizer Mittelland	5	429	37 358	60 970	1.6
Basel Region	3	393	33 827	67 931	2.0
Ticino	4	554	45 379	95 469	2.1
Fribourg Region	1	76	x	x	x
Neuchâtel/Jura/Jura Bernois	2	168	x	x	x
Switzerland	58	6 425	460 925	911 922	2.0

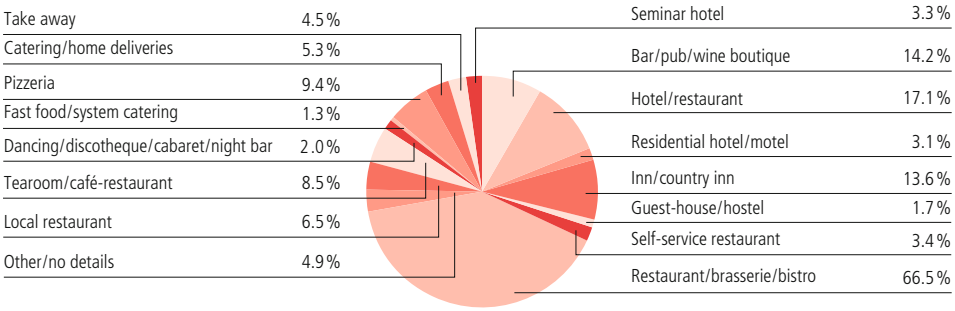
x = omitted for purposes of data protection (less than 3 establishments)
Source: Swiss Federal Statistical Office

Business size: number of seats per restaurant



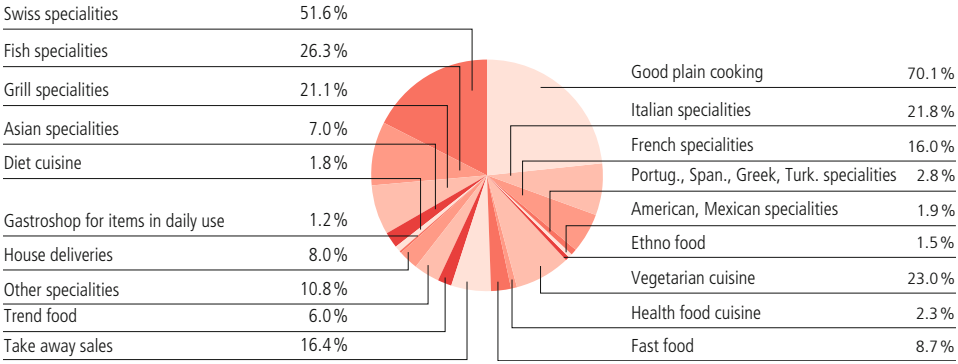
Business type: Guaranteed variety!

(Multiple choice possible)



Offer: Plain cooking remains No. 1

(Multiple choice possible)



Source: Industry Report 2008, GastroSuisse

Sales development compared to same quarter of the previous year (2000–2007)



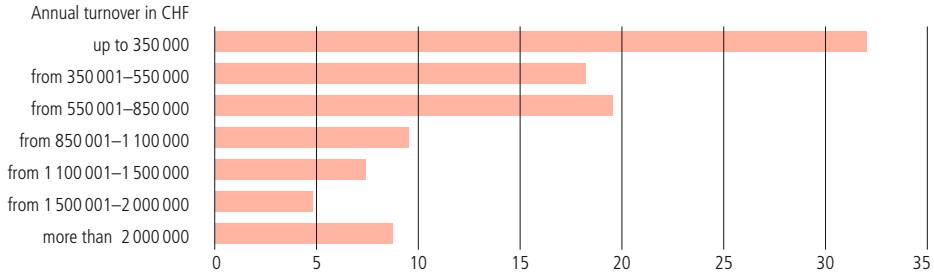
Source: Survey KOF (economic research department of the Swiss Federal Institute of Technology, Zurich) in cooperation with GastroSuisse, Industry Report 2008

The tangible upswing in the hotel and restaurant industry in 2006 continued to develop positively last year, in 2007. The third quarter in particular was very satisfactory, with an increase in sales of 5.6 per cent compared to the same quarter in the previous year. It is a long time since the hotel and restaurant industry last recorded such good results.

In the restaurant sector, the average sales development was positive in all quarters. Despite this gratifying development, the sales growth was slightly lower compared to that of the industry overall.

The establishments offering accommodation are continuing the positive trend from 2006; an extremely successful year was recorded in 2007. In the 3rd quarter of 2007, the highest growth since the economic survey of the hotel and restaurant industry started in 1988 was recorded, with an increase in turnover of 8.4 per cent compared to the same quarter in the previous year.

Turnover per business [1] – the hotel and catering industry is clearly dominated by small and medium businesses



Source: GastroSuisse, Industry Report 2008

Turnover per establishment in %

Around one third (32%) of the establishments in the hotel and restaurant industry generate a maximum turnover of up to CHF 350 000. The turnover of four-fifths (79.2%) of the establishments is under CHF 1 100 000. This indicates that the hotel and restaurant industry consists very clearly of SME establishments, and not just related to the number of employees but also based on the turnover.
A comparison with the prior year shows that the proportion of establishments with an annual turnover of less than CHF 850 000 has fallen and the proportion of establishments with an annual turnover of more than CHF 850 000 has increased.

1) Surveys of restaurants and hotels

An overview of important key ratios for the hotel and restaurant industry

Key figure	Average amount in CHF	Minimum amount in CHF	Maximum amount in CHF
Operating income per employee	108 200.00	89 200.00	142 300.00
Income from food preparation per employee	164 900.00	119 100.00	231 700.00
Operating income per service employee	271 700.00	236 700.00	431 300.00
Turnover per seat and hour of operation	4.20	2.45	6.55
Turnover per working hour	58.15	47.05	72.00
Turnover per service hour	126.90	96.20	165.75
Turnover per employee and operating day	359.75	290.10	444.00

Source: Industry Report 2008, Gastroconsult AG / GastroSuisse

These key ratios provide valuable information for assessing the operating efficiency of a hotel establishment. However, it needs to be taken into account that one individual establishment can never be fully compared with another. That is why individual key ratios can also deviate substantially from the average figures. Nevertheless, this information from the comprehensive operating statistics of Gastroconsult AG can offer valuable indications for a comparison with competitors.
Compared to the prior year, the operating turnover per person employed grew from CHF 105 400 to CHF 108 200. An increase was also discernible among the other key ratios for the hotel and restaurant industry.

Further information in the publication from GastroSuisse «Branchenspiegel 2008» («Industry Report»), available from GastroSuisse, P.O. Box, 8046 Zurich, for CHF 28.00.

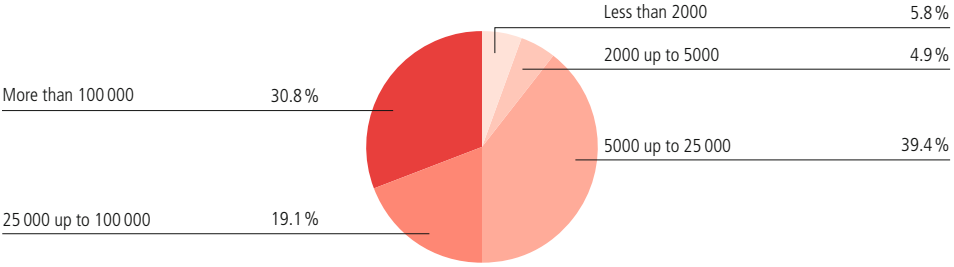
Key figures from Swiss travel agencies

	2004	2005	2006
Jobs and employees			
Extrapolated turnover, Swiss travel agencies in billions of CHF	11.3	12.5	13
Average number of full-time-equivalent employees per travel agency	4.6	4.8	4.7
Number of employees, extrapolated to the entire sector	10 120	10 560	10 400
Quota of women	approx. 75%	approx. 75%	approx. 77%
Retailer figures			
Annual payroll total per travel agency in CHF	333 100	350 200	364 700
Annual payroll total per full-time-equivalent employee in CHF	72 000	73 700	76 000
Gross turnover per travel agency in CHF	5 057 400	5 454 000	5 559 000
Gross turnover per full-time-equivalent employee in CHF	1 084 700	1 116 200	1 193 000

Source: Survey by Economic Research of Credit Suisse, Swiss Federation of Travel Agencies

90 percent of travel agencies are solely active in the retail sector (leisure); the previous year's figure was only 86 percent. 74 percent of travel agencies keep their range as wide as possible while 26 percent are specialists. The total number of trainees in 152 travel agencies is 250. The most important region for travel agency activities is the Zurich region, followed by the Lake Geneva area.

Location of travel agencies in Swiss cities by number of inhabitants



Source: Survey by Economic Research of Credit Suisse, Swiss Federation of Travel Agencies

A good half of all travel agencies are based in towns with more than 25 000 inhabitants and one third are located in cities with a population of more than 100 000.

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 percent travel by plane, and 4 percent 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 28 300 km. 27 200 stopping points are served. A total of 486 million railway and vehicle kilometres are available. In 2007, 2.12 million passengers made use of a half fare card, 344 500 persons held a general abonnement valid throughout the country and around 962 000 persons obtained a combined season ticket in one of the 21 regional tariff networks.

One of the densest railway networks in the world

The length of the Swiss railway network is 5062 km. This is made up of 3680 km of normal gauge lines – of which 3011 km are part of the Swiss Federal Railways network – and 1382 km of narrow gauge lines.

Swiss Federal Railways runs around 7000 train services or 350 000 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 2007, Swiss Federal Railways carried 307 million passengers. The average journey distance amounted to 49 km per day. In addition to Swiss Federal Railways, a further 46 railway companies operate in the public transport sector.

The bus, car and PostBus network as a distributor

52 local transport companies carried passengers by tram, trolleybus and bus in the area around the larger cities and agglomerations on 3482 km routes. 78 bus companies operated on 17 210 km regional routes (figures include PostAuto/Swiss PostBus Ltd). In 2007, 12 936 employees of tram, trolleybus and bus are carried 1158 Millions of passengers.

9 regions of PostBus 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 740 PostBus routes operate a route network of 9827 km. 1627 PostBus employees with 1909 postal buses (75 000 seats) conveyed 111 million passengers. In the course of this, the vehicles covered a distance of 89 million kilometres, or the equivalent of six times the circumference of the earth each day. In addition, around 1340 drivers are employed by PostBus companies.

Bustling navigation on Swiss lakes

26 shipping companies on a total of 22 lakes and rivers publish schedules in the official timetable 2007. Ships operate in the following categories:

Category	Boats	Lakes
Steamers	15 boats	on 6 lakes
Diesel-electric paddle boats	3 boats	on one lake
Motor boats	143 boats	on 22 lakes and rivers
Solar-electric boats	3 boats	on 2 lakes
Ferries	9 boats	on 4 lakes
Barges	4 boats	on 3 lakes and rivers

Source: LITRA, public transport information service

177 boats offered 50 394 seats to passengers. In 2007, 13.6 million passengers travelled on Swiss lakes and rivers. This is around 2 percent more than in 2006 (barely 13.6 million passengers).

Over 36 million air passengers

In 2007, Switzerland's airports recorded some 421 780 flight movements (take-offs and landings, only scheduled and charter flights). Of the 36.5 million passengers taking off from or landing in Switzerland, about 270 000 used Switzerland as a transit destination.

Airport	Movements	Local and transfer passengers	Transit passengers	Total passengers
Basel Mulhouse	57 141	4 236 519	33 970	4 270 489
Berne Belp	3 913	88 961	4506	93 467
Genève Cointrin	127 909	10 734 901	133 276	10 868 177
Lugano Agno	6 299	186 764	294	187 058
Sion	52	3 923	0	3 923
St. Gallen Altenrhein	2 636	98 991	0	98 991
Zurich Kloten	223 830	20 717 105	96 765	20 813 870
Total	421 780	36 067 164	268 811	36 335 975

Source: Federal Office of Civil Aviation, Swiss Federal Statistical Office

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.

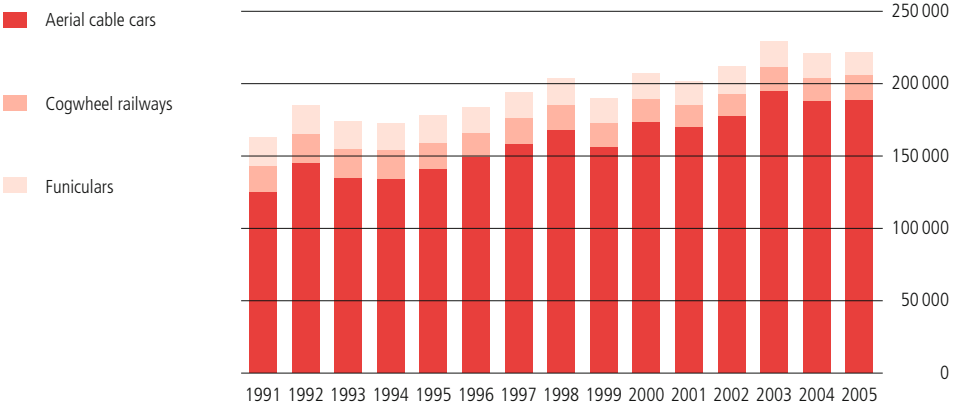
– Throughout Switzerland, mountain railways employed 2826 full-time and 5883 part-time workers alone in transport operations. And additional positions of employment were offered in other associated branches, such as gastronomy.

– In its core business of passenger transport, 2005 mountain railways achieved the sum of around 900 million Swiss francs through guest transport (Passenger-traffic proceeds). This represents a plus of 5% as compared to the previous year.

– Thereby, the number of passengers transported with federally licensed mountain railways slightly increased (+0.12%) as compared to the previous year.

– The regions, in which passenger transport proceeds were generated, extend from the foothills of the Waadtland Alps through to the alpine areas of Graubünden. In 2006, the Valais and Graubünden each achieved an approximate third of the proceeds, close to a sixth was achieved through the Bernese Oberland and Central Switzerland, and the rest through Eastern Switzerland and the cable railway enterprises of Fribourg and Waadtland.

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



Source: Swiss Federal Statistical Office

Swiss Ski and Snowboard Schools

In around 180 Swiss ski and snowboard schools, approximately 4000 ski, snowboard, telemark and nordic instructors are engaged. During the high season, as many as 7500 teach in these schools that offer skiing, snowboard, nordic and telemark lessons for both children and adults. On request, there are also a number of other sportive and comprehensive activities available to guests.

Half-day lessons [1)]

	2004/05	2005/06	2006/07	2007/08
	712 727	733 863	712 735	746 666
Graubünden	99 810	89 883	89 705	104 340
Eastern Switzerland	127 061	128 619	103 844	135 043
Central Switzerland	40 490	40 568	9 092	37 985
Western Switzerland	195 002	212 332	183 253	205 399
Lake Geneva Region (Vaud)	259 780	288 344	250 374	301 438
Berne	6 350	11 624	8 822	15 171
Ticino	612 186	676 153	661 226	707 999
Valais	2 053 406	2 181 386	2 019 051	2 254 041

Switzerland

1) A half-day lesson corresponds to two hours of 60 minutes.
Source: SWISS SNOWSPORTS

Cycling in Switzerland

Outstanding results for Cycling in Switzerland: in 2004 cyclists rode approx. 235 million kilometres on the Cycling in Switzerland route network. 170 000 travellers en route for several days generated over 570 000 overnight stays. Services and goods 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.

Overnight stays of bicycle tourists according to lodging facility 2004

Hotel	Camping	Youth hostel	Farm	Bed & Breakfast	Friends / Relations	Others	Total
268 000	75 000	77 000	49 000	38 000	25 000	42 000	574 000

Source: Cycling in Switzerland

Basic vocational education and training

Five new basic training courses were introduced in the hotel and catering industry. Catering specialists replace the existing specialised service employees and hotel specialists replace the existing specialist hotel assistants. Specialist catering assistants will no longer be trained in the future. Another new feature consists of the three two-year basic training courses for kitchen employees, catering employees and hotel employees, which lead to the Basic federal certificate. About 10 000 trainees are being educated in the tourism sector at present.

	Certificates of qualification issued		Apprentices hired	
Advanced federal certificate (AFC)	Total 2005	Total 2006	Total 2005	Total 2006
Koch / Köchin	1431	1505	2138	2144
Servicefachangestellte / r	562	641	123	6
neu: Restaurationsfachfrau / -mann	–	–	718	852
Hotelfachassistent / in	206	209	10	1
neu: Hotelfachfrau / -mann	–	–	327	380
Gastronomiefachassistent / in	221	272	15	12
Hotel- und Gastrofachfrau / -mann	30	37	48	44
Kaufmann / -frau B				
Hotel-Gastro-Tourismus	–	14	9	6
Öffentlicher Verkehr	–	12	–	–
Reisebüro	–	3	9	17
Transport	–	–	6	5
Kaufmann / -frau E				
Hotel-Gastro-Tourismus	1	178	168	132
Öffentlicher Verkehr	119	193	239	238
Reisebüro	25	227	237	224
Transport	–	–	27	34
Bahnbetriebsdisponent / in	18	12	12	10
Matrose / Matrosin der Binnenschifffahrt	–	–	10	4
Zugbegleiter / in	7	6	6	6

Basic federal certificate (BFC)	Total 2005	Total 2006	Total 2005	Total 2006
Küchenangestellte / r	–	–	220	257
Restaurationsangestellte / r	–	–	66	64
Hotellerieangestellte / r	–	–	25	40

Source: Swiss Federal Statistical Office

Higher vocational education and training

	2005	2006	2007		
Certificate exams of higher vocational education and training	Total	Total	Men	Women	Total
Flight Attendant	24	23	14	29	43
Gastronomiekoch/-köchin	49	58	62	8	70
Koch/Köchin der Spital-, Heim- und Gemeinschaftsgastronomie [1]	23	16	15	5	20
Restaurationsleiter/in	13	4	4	10	14
Hotelempfangs- und Administrationsleiter/in [2]	–	8	–	–	–
Carführer/in, Reiseleiter/in	9	–	–	–	–
Fachmann/-frau im Tourismus-Management	11	–	13	10	23
Reisefachmann/-frau	–	5	–	–	–
Tourismusassistent/in [3]	20	10	–	1	1
Schneesportlehrer/in	1924	8	3	–	3
Seilbahnfachmann/-frau	22	16	16	–	16
Bergführer/in	33	32	25	–	25
Fachmann/-frau im Pisten- und Rettungsdienst	–	23	–	–	–
Colleges of higher vocational education and training	Total	Total	Men	Women	Total
Hauswirtschafliche/r Betriebsleiter/in	–	75	–	–	–
Hotellerie-Restauration [4]	390	387	202	236	438
Tourismusfachmann/-frau	360	371	92	278	370
Diploma exams of higher vocational education and training	Total	Total	Men	Women	Total
Tourismus-Experte/Expertin	–	6	–	–	–
Manager/in öffentlicher Verkehr [5]	–	20	–	–	–
Betriebsleiter/in der Gemeinschaftsgastronomie [6]	16	–	13	4	17
Küchenchef/in Produktionsleiter/in	1	21	–	–	–
Restaurateur/in	24	37	12	9	21
Restaurationsleiter/in [7]	–	14	–	–	–

1) former: Spital- und Heimkoch/-köchin
2) former: Hoteldirektionsassistent/in
3) former: Gästeberater/in für Tourismus
4) former: diveded in Hotellerie-Restauration and Restauration-Hotellerie
5) fromer: Experte/in öffentlicher Verkehr
6) former: Betriebsleiter/in der Gemeinschaftsverpflegung
7) former: Maître d'hôtel
Source: Swiss Federal Statistical Office

Quality label for the Swiss tourism industry

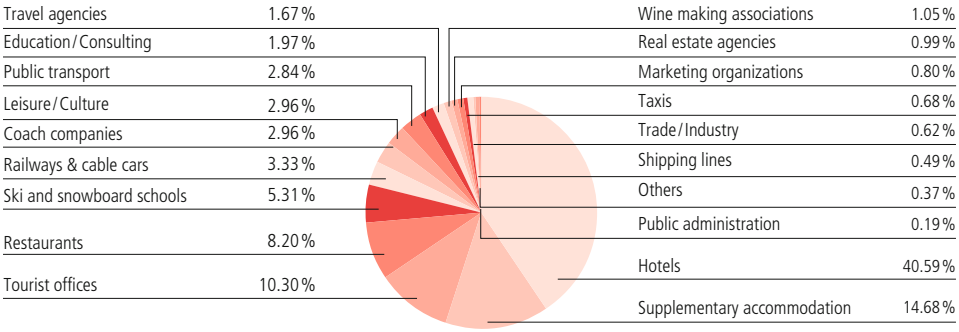
The quality program for Swiss tourism is aimed at improving quality awareness and the further development of quality services for tourists in all Switzerland's tourist enterprises. The program is supported by twelve operational tourist partners.

Level I concentrates on quality development and is aimed especially at service quality. The establishments are subject to random spot checks on site.

Level II focuses on quality assurance. All businesses holding Q II are regularly checked by independent Mystery Persons.

Level III is awarded to businesses which have implemented a comprehensive, internationally-recognised Quality Management System.

Distribution of the Quality Label among sectors of the industry (31.12.2007)



A total of 4034 Quality Labels for Swiss Tourism have been awarded since 1998. Once awarded, the period of validity is three years.

Awarded Quality Labels

	1998	2005	2006	2007	Change in % 06/07
Level I	175	366	333	411	23.4
Level II	74	63	67	70	4.5
Level III	–	41	69	79	14.5
Total	249	470	469	560	19.4

Source: Swiss Tourism Federation

International Tourist Arrivals

Different factors like volatility of aviation fuel prices, exchange rate fluctuations, economic slowdown and credit crunch, isolated terrorist incidents, isolated outbreaks of avian flu, foot and mouth disease, floods, hurricanes, landslides and forest fires influenced international tourism. 2007 tourism performance is all the more impressive.

In 2007, international tourist arrivals grew by an estimated 6.1% to reach a new record figure of nearly 898 million. This represents nearly 52 million more arrival than in 2006. In fact, world tourism enjoyed iths fourth consective year of growth in 2007 above the longterm forecast of 4.1% and, surprisingly, it even exceeded the 5.5% increases recorded in 2005 and 2006.

	International arrivals in millions						Change in %		
	1990	2003	2004	2005	2006	2007[1)]	05/04	06/05	07/06[1)]
Europe	264.8	396.6	424.5	438.7	460.8	480.1	4.3	5.0	4.2
Northern Europe	30.3	44.5	49.7	51.0	54.9	56.0	7.8	7.6	2.0
Western Europe	108.6	136.1	139.0	142.6	149.8	155.0	2.6	5.0	3.5
Central/ Eastern Europe	32.0	68.3	86.3	87.8	91.2	92.8	2.2	3.9	1.7
Southern/ Mediter. Europe	93.9	147.7	149.5	157.3	164.9	176.3	5.9	4.8	7.0
Asia and Pacific	57.7	119.3	145.4	155.3	167.2	184.9	7.8	7.7	10.2
North-East Asia	28.0	67.6	79.4	87.5	94.0	104.2	10.3	7.4	10.5
South-East Asia	21.5	36.2	48.3	49.3	53.9	60.4	4.9	9.3	11.8
Oceania	5.2	9.0	10.1	10.5	10.5	10.7	3.7	0.4	1.4
South Asia	3.2	6.4	7.6	8.0	8.8	9.7	4.7	11.0	7.8
Americas	92.8	113.1	125.9	133.2	135.9	142.1	5.9	2.0	4.7
North America	71.7	77.4	85.8	89.9	90.7	95.0	4.7	0.9	4.7
Caribbean	11.4	17.0	18.1	18.8	19.4	19.3	3.7	3.5	–0.9
Central America	1.9	4.9	5.7	6.3	7.0	7.7	13.2	10.8	11.1
South America	7.7	13.7	16.2	18.2	18.8	20.2	11.9	3.0	8.1
Africa	15.2	30.8	33.4	37.3	40.7	44.2	8.8	9.2	7.9
North Africa	8.4	11.1	12.8	13.9	14.9	16.4	8.9	7.4	8.5
Subsaharan Africa	6.8	19.7	20.7	23.3	25.8	27.8	8.8	10.4	7.5
Middle East	10.0	30.0	36.3	38.3	41.8	46.4	5.9	8.9	13.4
World	441	690	766	803	846	898	5.5	5.4	6.1

1) Estimate
Source: UNWTO

Top destinations

Rank	Country of destination	International arrivals in millions		Change in %	
		2005	2006	05/04	06/05
1	France	75.9	79.1	1.0	4.2
2	Spain	55.9	58.5	6.6	4.5
3	United States	49.2	51.1	6.8	3.8
4	China	46.8	49.6	12.1	6.0
5	Italy	36.5	41.1	–1.5	12.4
6	United Kingdom	28.0	30.7	9.2	9.3
7	Germany	21.5	23.6	6.8	9.6
8	Mexico	21.9	21.4	6.3	–2.6
9	Austria	20.0	20.3	3.0	1.5
10	Russia	19.9	20.2	0.2	1.3
11	Switzerland[1)]	10.5	11.4	10.5	8.8

Rank	Country of destination	International income tourism in billion US$		Change in %	
		2005	2006	05/04	06/05
1	United States	81.8	85.7	9.7	4.8
2	Spain	48.0	51.1	6.0	5.6
3	France	42.3	46.3	3.5	0.6
4	Italy	35.4	38.1	–0.7	6.7
5	China	29.3	33.9	13.8	15.9
6	United Kingdom	30.7	33.5	9.5	8.5
7	Germany	29.2	32.8	5.4	11.3
8	Australia	16.9	17.8	6.9	7.3
9	Turkey	18.2	16.9	14.2	–7.2
10	Austria	16.0	16.7	2.7	3.1
11	Switzerland[1)]	11.0	11.8	8.2	8.0

1) Estimate Switzerland Tourism
Source: UNWTO

Tourism Interest Groups and Professional Associations

Association of postgraduate Hoteliers – Restaurateure SHV/Hotelmanager HF-NDS, Secretariat, Zürichstr. 78, 8118 Pfaffhausen, phone +41 (0)43 355 57 82, fax +41 (0)43 355 57 93, www.vdh.ch, welcome@vdh.ch. Networking, further education and friendship care for students of the postdiploma course «Unternehmensführung resp. Nachdiplomstudium HF-NDS» of hotelleriesuisse.

Association of Swiss Tourism Managers (ASTM), c/o FST, P.O.Box 8275, 3001 Berne, phone +41 (0)31 307 47 43, fax +41 (0)31 307 47 48, www.vstm.ch, info@vstm.ch. Association suisse des managers en tourisme. To promote the professional interests of tourist office managers. Vocational training and advanced training of tourist office personnel, 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. Safeguarding the interests of the 16 member shipping companies.

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. European breakdown service, to safeguard the interests of motorists, legal counseling and support, emergency road service, tourist service.

Bed and Breakfast Switzerland GmbH, Chemin du Verger 32, 1752 Villars-sur-Glâne, phone 079 627 95 49, fax 026 400 06 76, www.bnb.ch, admin@bnb.ch. Organisation of Swiss BnB host families. Purpose: information, promotion, publication of the «Bed and Breakfast Switzerland Guide», quality standards.

Community of Interest of the Higher Schools of Tourism Management Switzerland, c/o HFT Luzern, Rösslimatte 48, Postfach 3140, 6002 Luzern, phone +41 (0)41 228 41 41, fax +41 (0)41 228 41 44, www.hft-schweiz.ch. Safeguarding common interests towards the public authorities, associations and the general public, promotion of tourism management education and training in Switzerland.

CONTACT groups.ch, Hotels and Holiday Homes for Groups in Switzerland, Spitzackerstrasse 19, P.O.Box , 4410 Liestal, phone +41 (0)61 926 60 00, fax +41 (0)61 911 88 88, www.groups.ch, contact@groups.ch. Organisation of the Hotels and Holiday Homes for Groups in Switzerland. Services: wordwide marketing, consultation and settlement services, travel insurance specifically for groups, central rental agency (no commissions).

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. The strongest women's network for women in the tourism industry.

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. GastroSuisse is the leading national association of hotels and restaurants. Around 21 000 members (hotels, bed & breakfast establishments, guest houses, restaurants and cafes) in 26 cantonal sections and four specialist groups 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. The leading association for hotels and accommodation in Switzerland. Creator and owner of the official Swiss hotel classification system.

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. Union of employees, professionals and management staff of the hotel/restaurant trade.

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. To safeguard the interests of members, to encourage cooperation among members, information and consultation services, training of professionals.

Safety in adventures, Office: beco Berner Wirtschaft, Münsterplatz 3, 3011 Bern, www.safetyinadventures.ch, info@safetyinadventures.ch, Certification Body: SQS, Luigi Arigoni, phone +41 (0)81 356 00 21, fax +41 (0)81 356 00 22, luigi.arigoni@sqs.ch. 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.

«schlaf im Stroh!» (SIS), Brünigstrasse, 6078 Lungern, phone +41 (0)41 678 12 86, fax +41 (0)41 678 12 88, www.schlaf-im-stroh.ch, info@schlaf-im-stroh.ch. The objective of this Swiss Association is the promotion of agrotourist services associated with the protected trademark «schlaf im Stroh!» («Sleep on Straw») and its quality charter, as well as supporting the hosts providing these services.

Swiss Association of Coffeehouse-Holders (SCV), Bleicherweg 54, 8002 Zurich, phone +41 (0)44 201 67 77, fax +41 (0)44 201 68 77, www.cafetier.ch, info@cafetier.ch. 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. 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. Promotion of camping vacations and classification of camp sites.

Swiss Centre for mountain regions (SAB), Seilerstrasse 4, PO Box 7836, 3001 Bern, phone 031 382 10 10, www.sab.ch, info@sab.ch. Created in 1943. Lobbying for mountain regions and advisory services for projects in regional development.

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/cities, swisscities@switzerland.com. Promotion of Switzerland as a meeting, congress and incentive destination.

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. 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.agrotourismus.ch, info@feierlenhof.ch. 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.

SwitzerlandMobility, P.O.Box 8275, 3001 Berne, phone +41 (0)31 307 47 40, fax +41 (0)31 307 47 48, www.switzerlandmobility.ch, info@switzerlandmobility.ch. Quality assurance, information, development of national and regional offers for hiking, cycling, mountain biking, skating and canoeing.

Swiss Mountain Guides' Association, Hadlaubstrasse 49, 8006 Zurich, phone +41 (0)44 360 53 66, www.4000plus.ch, sbv@awww.ch. Professional association of the approximately 1500 mountain guides. Training and further education for mountain guides, hiking guides, climbing teachers and «Rope-assisted working». Trade journal: Berg&Ski.

Swiss PostBus Ltd, Belpstrasse 37, P.O.Box, 3030 Berne, phone +41 (0)848 11 12 13, fax +41 (0)58 667 32 86, www.postbus.ch, infopag@postauto.ch. The leading provider of regional passenger services on Swiss roads.

SWISS SNOWSPORTS, Hühnerhubelstrasse 95, 3123 Belp, phone +41 (0)31 810 41 11, fax +41 (0)31 810 41 12, www.snowsports.ch, info@snowsports.ch. 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.swissthermalspa.ch, info@swissthermalspa.ch. 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, info@swisstourfed.ch. 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. The promotion of social and family tourism, vacation financing by issuing Reka currency, running of REKA vacation centres, vacation apartment rentals.

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, booking office@youthhostel.ch. 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. Promotion of Switzerland as a meeting and congress destination.

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. Assistance to persons in case of emergency all around the world, emergency road service in Europe, tourist service, to safeguard the interests of the motorists, legal counseling and support.

Wellbeing Switzerland, Office of Swiss Health Hotels, Sonnenbühlstrasse 3, 9200 Gossau, phone +41 (0)71 350 14 14, fax +41 (0)71 350 14 18, www.wohlbefinden.com, info@wohlbefinden.com. Representing the interests of health hotels, rehabilitation and convalscent homes.

Public corporations

Swiss Association for Hotel Credit (SGH), Gartenstrasse 25, P.O.Box, 8027 Zurich, phone +41 (0)44 209 16 16, fax +41 (0)44 209 16 17, www.sgh.ch, info@sgh.ch. Financing, appraisals, consulting.

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@myswitzerland.com. Offices in 27 countries. Increase the demand for Switzerland as a travel, holiday and congress destination. Federal institutes

Federal institutes

State Secretariat for Economic Affairs (SECO), Tourism, Effingerstrasse 27, 3003 Berne, phone +41 (0)31 322 27 58, fax +41 (0)31 323 12 12, www.seco.admin.ch. Central federal authority for national and international tourism policies.

Swiss Federal Statistical Office, Tourism Subdivision, Espace de l'Europe 10, 2010 Neuchâtel, phone +41 (0)32 713 62 80, fax +41 (0)32 713 62 15, www.statistik.admin.ch, Info-tour@bfs.admin.ch. 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, Mühlestrasse 6, 3063 Ittigen, Postadresse: 3003 Berne, phone +41 (0)31 322 57 11, fax +41 (0)31 322 58 11, www.bav.admin.ch, webmaster@bav.admin.ch. 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. University lecturing, research, market research, consulting and expertising in the competence fields of tourism and transportation, regional economic and public management.

Institute of Tourism (ITW), Rösslimatte 48, P.O. Box 3140, 6002 Lucerne, phone +41 (0)41 228 41 45, fax +41 (0)41 228 41 44, www.hslu.ch/itw, itw@hslu.ch. An institute of the Hochschule Luzern-Wirtschaft, active in the fields of tourism and mobility, training and further education in tourist affairs, applied research and practice-orientated consultation.

Institute of Economy & Tourism (IET), HES-SO Valais (University of Applied Sciences Western Switzerland), TechnoArk 3, 3960 Sierre, phone +41 (0)27 606 90 01, fax +41 (0)27-606 90 00, http://iet.hevs.ch, tourisme@hevs.ch. The Institute of Economy & Tourism specializes in the areas of Alpine tourism, regional economy and development of new Internet business models through its teaching and research units «Tourism Management», «Public Management» and «Entrepreneurial Development».

Institute for Tourism and Leisure Research (ITF) at University of Applied Sciences HTW Chur, Comercialstrasse 22, 7000 Chur, phone +41 (0)81 286 39 34, fax +41 (0)81 286 39 49, www.itf.ch, itf@fh-htwchur.ch. BSc and MSc study programs and further education (EMBA) in tourism and leisure management. Applied research and consulting in Customer Management, Product Innovation Management, Business and Destination Development and 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. Research in tourism-related issues, lectures on tourism at Berne University, experts in the leisure and tourism sectors.

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.

EUROSTAT, Joseph Bech Building, L-2920 Luxembourg, phone +35 2 4301 33444, fax +35 2 4301 35349, www.epp.eurostat.ec.europa.eu, eurostat-pressoffice@ec.europa.eu.

HOTREC, Boulevard Anspach 111, Box 4, B-1000 Brussels, Belgium, phone +32 2 548 90 00, fax +32 2 502 41 73, www.hotrec.org, main@hotrec.org.

World Tourism Organization (UNWTO), Capitàn Haya 42, E-28020 Madrid, Spain, phone +34 915 678 166, fax +34 915 678 220, www.unwto.org, wtobc@unwto.org.