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2001 tourism figures marked by highs and lows.

Best winter ever for Swiss hotel business

The hotel business got off to a tremendous start in 2001, posting excellent overnight statistics for January and February and maintaining the strong growth that set in during 2000.

Although March saw the first signs of a decline, the Swiss hotel business still recorded its best winter ever in the six months from November 2000 to April 2001, registering a total of 15.03 million overnights.

A varied summer (May to October)

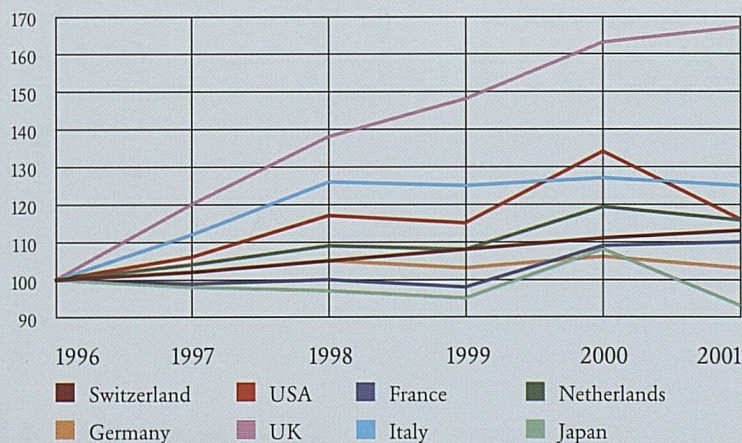
In a trend that first made itself noticed in May, each of the summer half-year months recorded a fall on the previous year's figures. Although home demand, which with a market share of 42% is by far the most important visitor segment, witnessed a 1.3% increase on the previous year (corresponding to 8.3 million overnights in hotel and health establishments), this welcome development could not compensate for the 5.8% drop in demand from abroad. In Germany (-4%) the stuttering economy began to leave its mark on foreign travel. This also applied to Japan (-14%) and the US (-19%). Other important foreign markets such as France (-1.7%), Italy (+0.4%) and the UK (-0.1%) were able to maintain the previous year's levels, however. Developments in some of the future markets again gave cause for satisfaction. Russia posted a 12% increase in the summer half year, China climbed 14%, and the Gulf States 15%. Canada developed differently to the US, jumping by 8%. When analysing all this data consideration also has to be given to uninfluencable factors such as the terrorist attacks, the poor September weather and the fine October weather. The rise in value of the Swiss franc compared to the most important currencies of as much as 5% also made Swiss holidays more expensive for foreign visitors, whereas rising prices made holidays abroad 4% more expensive for Swiss tourists.

A moving autumn and successful winter start

The tragic events of 11 September in the US saw demand collapse on the major overseas markets. The US and Japan posted falls of 36% and 31% respectively for the period September to December 2001. The reduction in flights and people's unwillingness to fly also had an effect in the opposite direction, however. Despite the harsh economic climate in Europe most of the winter resorts were able to match the healthy figures recorded in the previous year. The cities, however, which are heavily dependent on business travel, were still feeling the effects of the collapse in this segment months after 11 September.

Development of overnights in hotels and health establishments since 1996; major source markets 1996-2001

(Index: 1996 = 100)

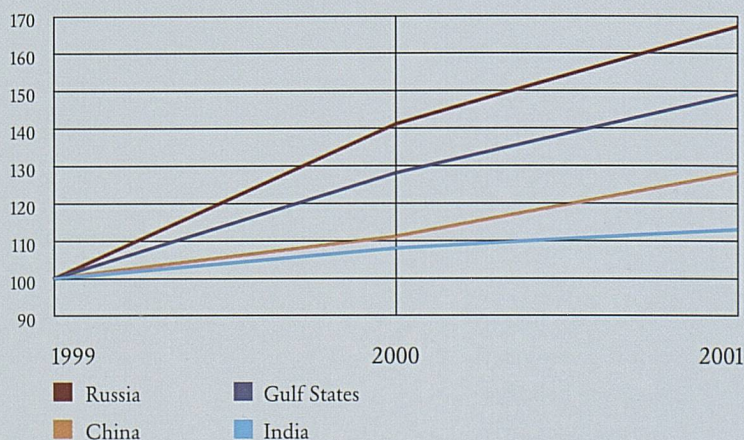


Representation of growth in traditional markets according to index points.

Source: SFSO 2001, in-house representation

Development of overnights in hotels and health establishments since 1999; selected future markets 1999-2001

(Index: 1999 = 100)



Representation of growth in future markets according to index points.

Source: SFSO 2001, in-house representation

2001 results slightly down

After a tremendous 2000 Swiss hotel and health establishments recorded 34,675 million overnights, corresponding to 1% drop on the previous year (visitors from abroad -3.3%, visitors from within Switzerland +2.1%).

An additional horizon: the figures for the previous five years

Comparing the figures for a year with those for the previous year often gives an incomplete picture. Following, we attempt to depict developments in the statistics for the number of overnights in general terms and with respect to selected markets over a five-year period. The results offer an interesting insight.

Developments in the hotel and supplementary accommodation sectors followed a different course in the previous five years. From 1996 to 2000 the number of overnights in Swiss hotels and health establishments increased by 13%, whereas the supplementary accommodation sector recorded a 6% fall in the same period.

Almost all the major origin markets have developed positively in the last five years, in particular the United Kingdom. At the end of 2001 the UK accounted for 67% more overnights than in 1996. Pleasingly, the Euro zone countries also registered growth, despite the fact that the euro has lost up to 9% in value compared to the Swiss franc since its introduction as a book currency.

Extraordinary growth rates were recorded in the future markets. Russia, China, the Gulf States and India all registered strong growth, the biggest in Russia, which generated 63% more overnights in Swiss hotels and health establishments from 1999 to 2001.

The broader outlook is positive

The Tourism Performance Index of the Research Institute for Leisure and Tourism at the University of Berne (FIF) represents an attempt to analyse what figures mean in economic terms. Taking the Graubünden region as an example, this pilot project reveals a positive development in sales despite “frequency losses” (fewer overnights). This means the region was able to increase its value added per unit sold, i.e. it has become stronger in economic terms. These findings result from the fact that the tourism barometer is no longer based solely on the number of overnights, but also on traffic figures, same-day tourism and sales figures.



Graubünden value-added analysis:

Frequency and sales development in tourism sectors, change as per summer 2000 compared to summer 2001

