

Travel in the year 2000 - largest growth in 20 years

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Travel in the year 2000 — largest growth in 20 years.

Hotels and health establishments

In the year 2000, Swiss hotels and health establishments succeeded in recording a +5.5% growth rate – a degree of growth such as we have not achieved for 20 years – thus constituting the fourth positive annual result in succession. This brings the overall figures to 13% above their last low in 1996 and only around 6% under the all-time high of 1990. Many indicators point towards further growth in 2001.

An absolute record was set by the Swiss hotel industry in December 2000: with 2.11 million overnight stays – i.e. approximately 9% or 174,000 overnight stays more than in 1999 – the Swiss hotel industry achieved the best December result ever.

While all the regions of the world are responsible for the growth recorded in the year 2000, guests from within Switzerland form by far the most important group. They booked a signi-

ficantly larger number of holidays in their home country (+3.1% more overnight stays) and thus represent a market share of 42%. Europe also holds a 42% share in the market and recorded significant growth (+5.7%). With a market share of 19%, the Germans head the list of foreign visitors. Further «stars» include the traditional European markets: France (+12%) growth as well as Great Britain, the Netherlands, Spain and Austria (+10% growth each).

The strong growth rates triggered by visitors from Eastern Europe and the Balkans are also remarkable. Together, they rose by +17% and hold a market share of around 2% with 781,000 overnight stays. Russia is the most prominent with an impressive growth of +41%. In Asia, the following countries recorded the most striking growth rates: Korea +65%, Malaysia +62%, Thailand +27%, Singapore +25% and Japan +14%. These countries together

account for a market share of approximately 3.5%. Asia in total registered a growth rate of approximately +12% and North America one of +16%.

Parahotels

No figures are available yet for the parahotel business, which in total generates a volume that is similar to that generated by hotels and health establishments. It can, however, be assumed that the favourable underlying conditions halted the slight fall-off in demand of 1999, and that the sector even achieved a small growth.

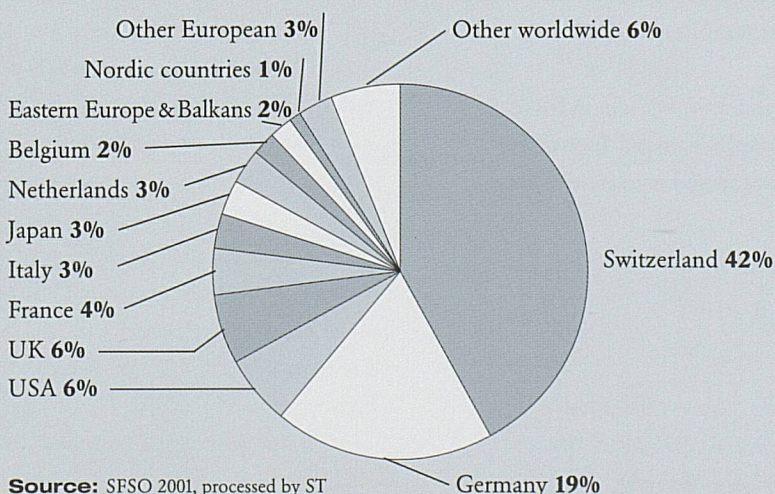
Day tourism

Day tourism creates revenue of approximately 7.8 billion CHF. This corresponds to a 37% share of the entire revenue created in tourism (21 billion CHF). Domestic day tourism already creates a turnover of 4.4 billion CHF – almost as much as the corresponding figure for domestic tourism with overnight stays (4.9 billion CHF).

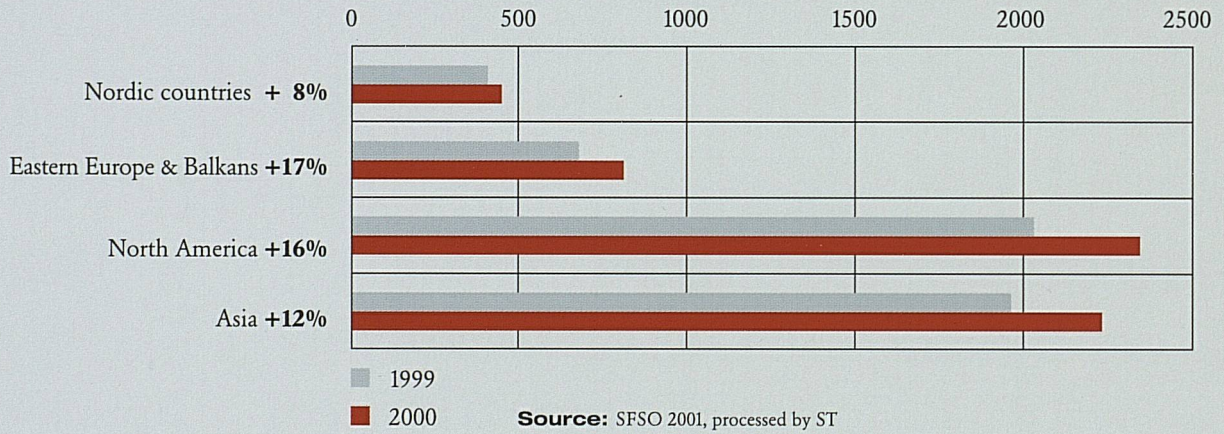
High investment needs

The positive lines along which demand is developing are pleasing and motivating. However, this should not tempt us to neglect the challenges that remain on the supply side. Sustainable competitiveness and, consequently, the basis for long-term growth will not be secured until the financing problems facing the hotel industry and the cableways have been defused, restructuring into marketable and powerful organizations has been completed and investments in infrastructure can be made.

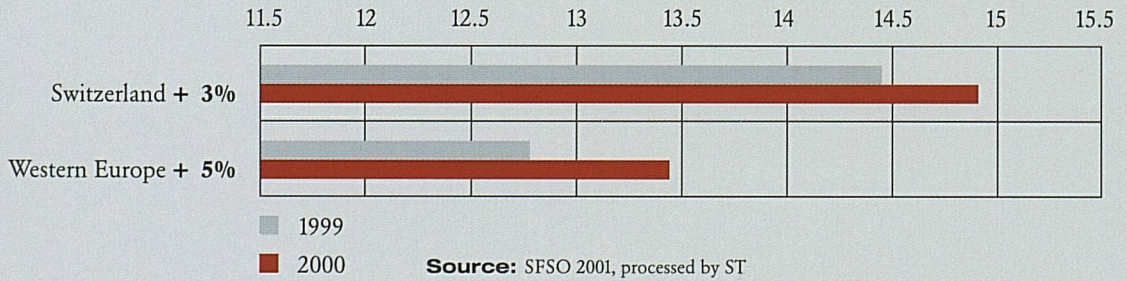
Shares of various source markets in overnight stays in hotels and health establishments



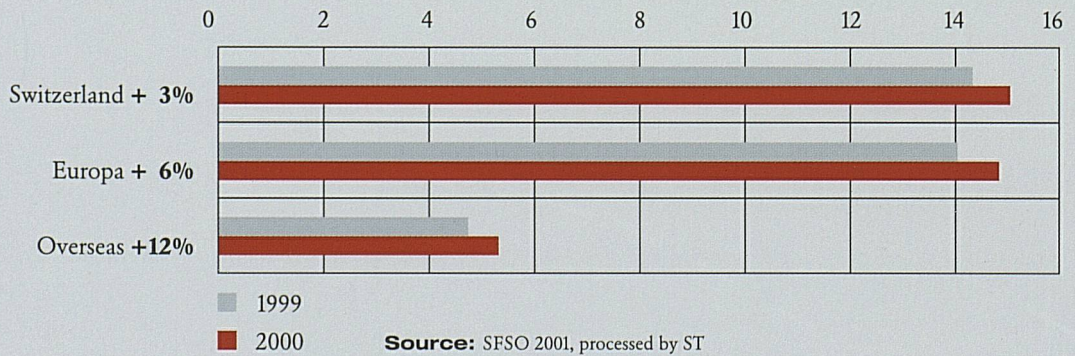
**Overnight stays in hotels and health establishments.
The biggest growth regions; changes 1999/2000
(in thousands)**



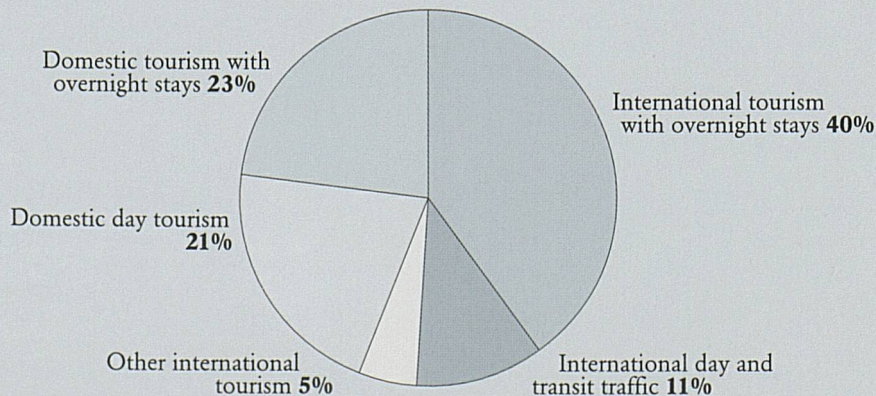
**Overnight stays in hotels and health establishments.
Switzerland, Western Europe; changes 1999/2000 (in millions)**



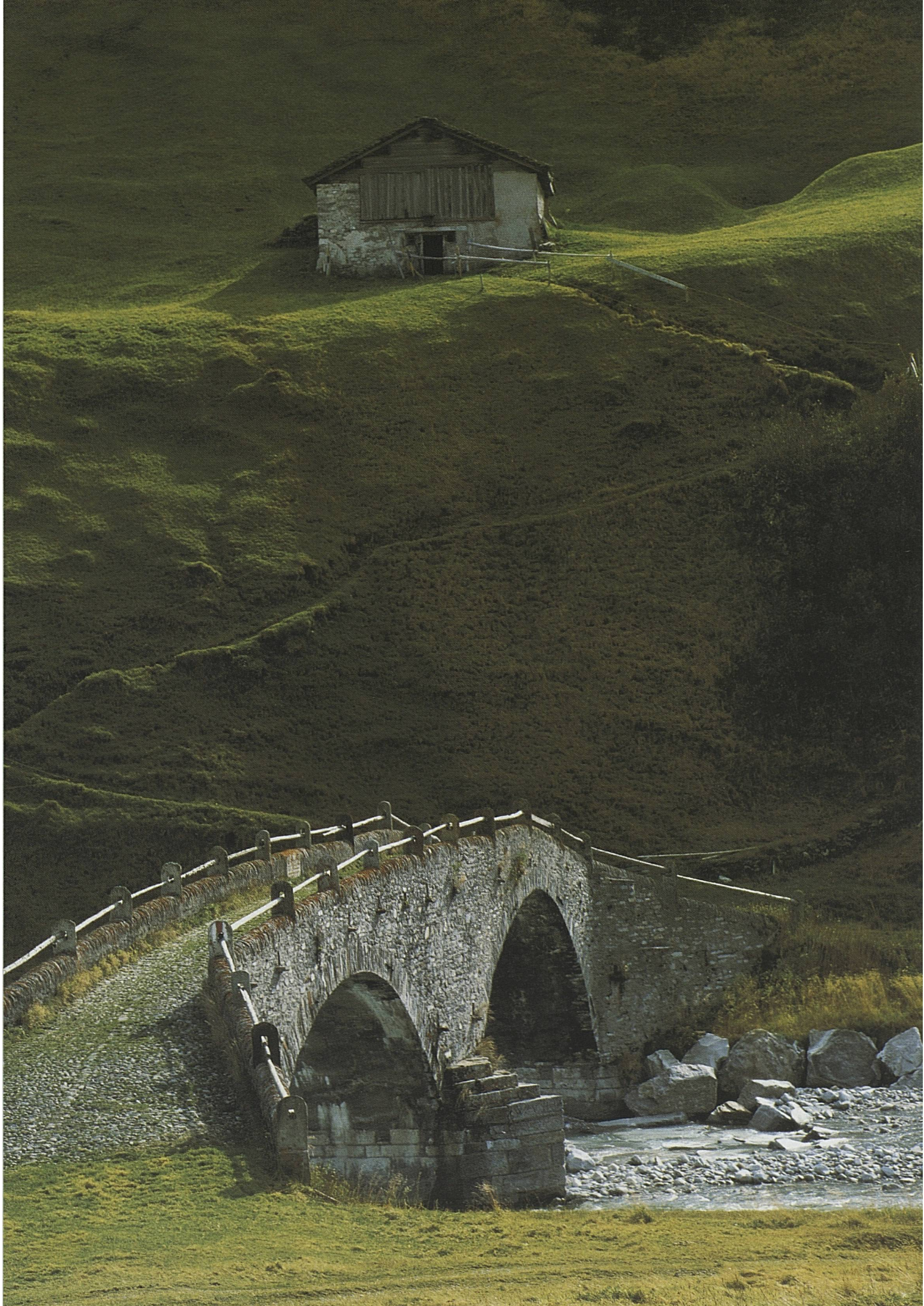
**Overnight stays in hotels and health establishments.
Switzerland, Europe, Overseas; changes 1999/2000 (in millions)**



Shares in total tourism revenue



Source: SFSO 2001, processed by ST



Team spirit makes us strong.

It is the task of Switzerland

Tourism to create connections

and build up networks. Everyone

benefits from cooperative deals

— primarily the customer.

Pooled forces make a good

product even better.





The field of wellness is among the largest growth markets in tourism.