

Contribution of tourism to the targets of the Lisbon Strategy

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- The Lisbon Strategy 2000
- Renewed Lisbon Strategy
- Role of Tourism for European Economy
- Changes and Challenges
- ICT and tourism – does it fit ?
- EC action plan & support

Defining the objectives

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Changes and
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ICT and tourism –
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- Overall objective
 - make the EU the „*most competitive and dynamic knowledge-driven economy by 2010*“
- Strategic goals
 - preparing the transition to a knowledge-based economy and society
 - better policies for the information society and R&D
 - modernising the European social model, investing in people and combating social exclusion

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- Spring summit 2004 outcome
 - give the Lisbon strategy fresh impetus
- three priority areas
 - Investment in networks and knowledge
 - Strengthening competitiveness in industry and services: industrial **policy**, **services** market and **environmental** technologies
 - Increasing labour market participation of older people

Its all about Tourism

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Some statements ...

- Everybody [...] is a tourist at one point or another (Innovation & Technology Transfer, May 2005)
- Tourism industry is one of Europe's leading employer
- Tourism is a highly service-oriented industry
- Revenue growth yields in increase of employment
- Services in tourism are (typically) bound to places

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- 760 million international tourist arrivals worldwide (WTO, 2004)
- 414 million tourist arrivals in Europe(25) corresponding to 55%
- 20 % business travels, 80% leisure travels
- Tourism industry contributes 4% of EU's GDP (gross domestic product)
- Tourism economy contributes 11% of EU's GDP

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- Highly SME-dominated (< 10 employees)
- High degree of market concentration:
 - Market share of the five EU largest travel organizers:
 - in 1997: 35 %
 - in 2002: 70%
- Employment
 - Tourism industry: 4% of total EU employment (7.3 million)
 - Tourism economy: 12 % of total EU employment (20.6 Million)

Tourism and the Lisbon Strategy

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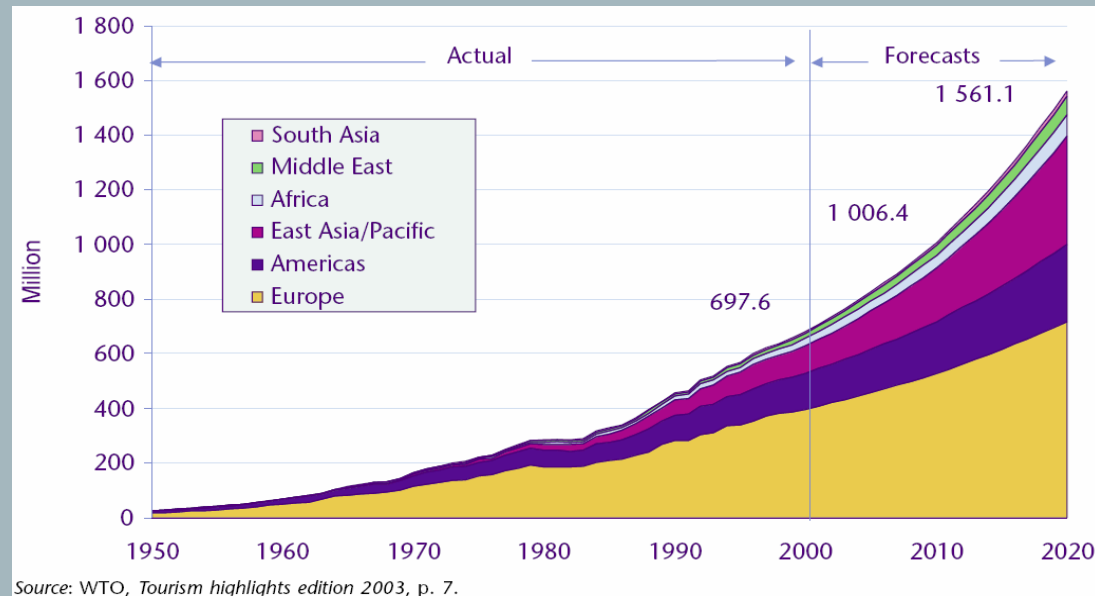
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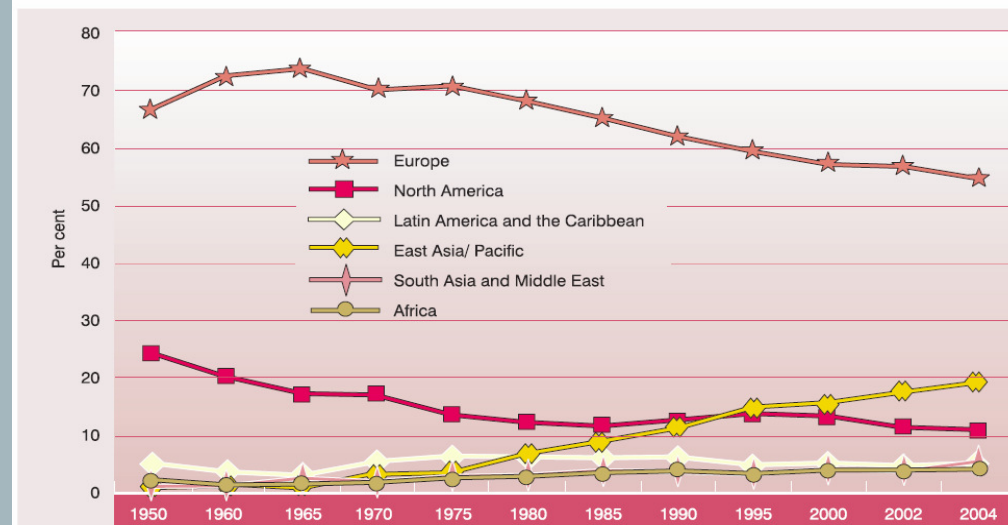
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Source: WTO, *Tourism highlights edition 2003*, p. 7.

Share of international tourism arrivals by region (1950-2004)



Source: UNCTAD elaboration of data from the World Tourism Organization.

Tourism and the Lisbon Strategy

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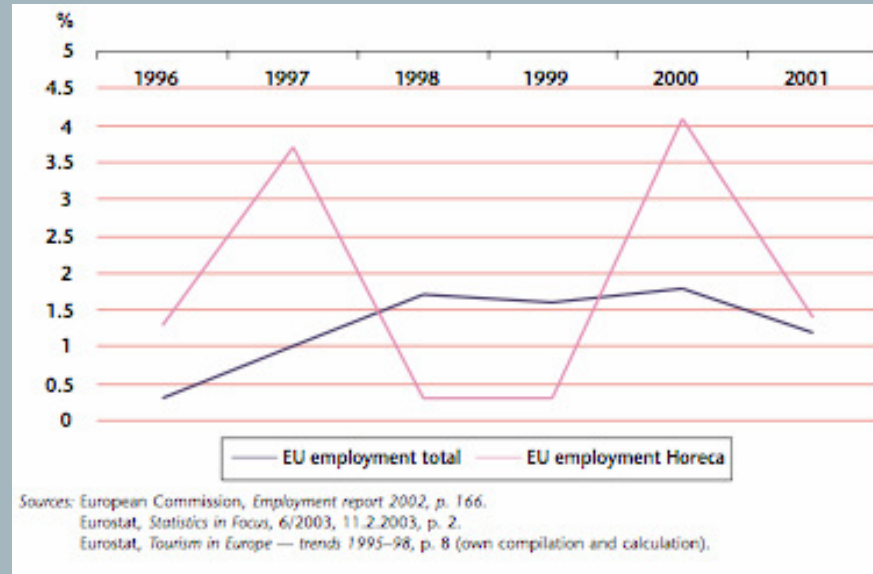
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Innovation is a must

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- Europe is still the world's most visited region
- But...
 - Increased competition at global level
 - New compelling destinations
 - Growth rate below average
 - Demographic changes
 - Demands for specific forms of tourism
 - Need for sustainability

Information is key ...

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- **Tourism in the internet age**

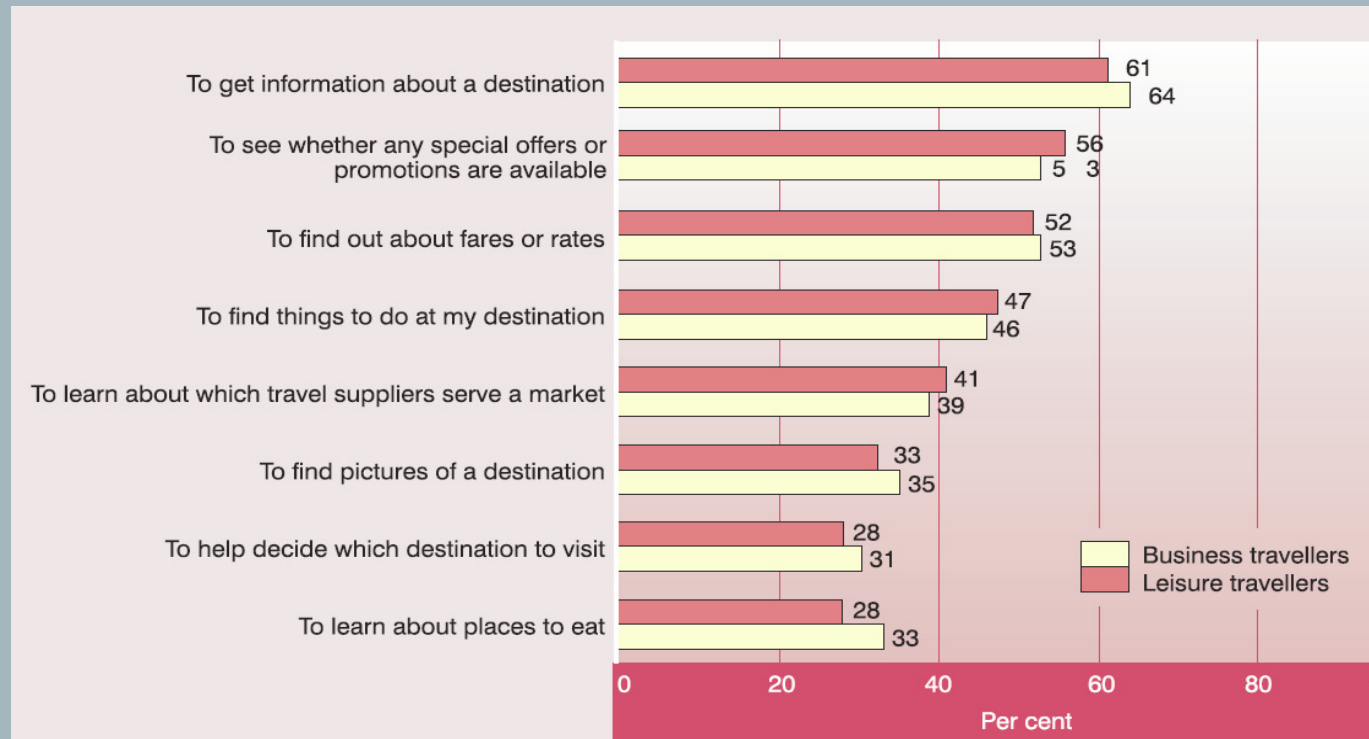
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Source: Forrester's Consumer Technographics®, December 2004 North America Studies

Online is king ...

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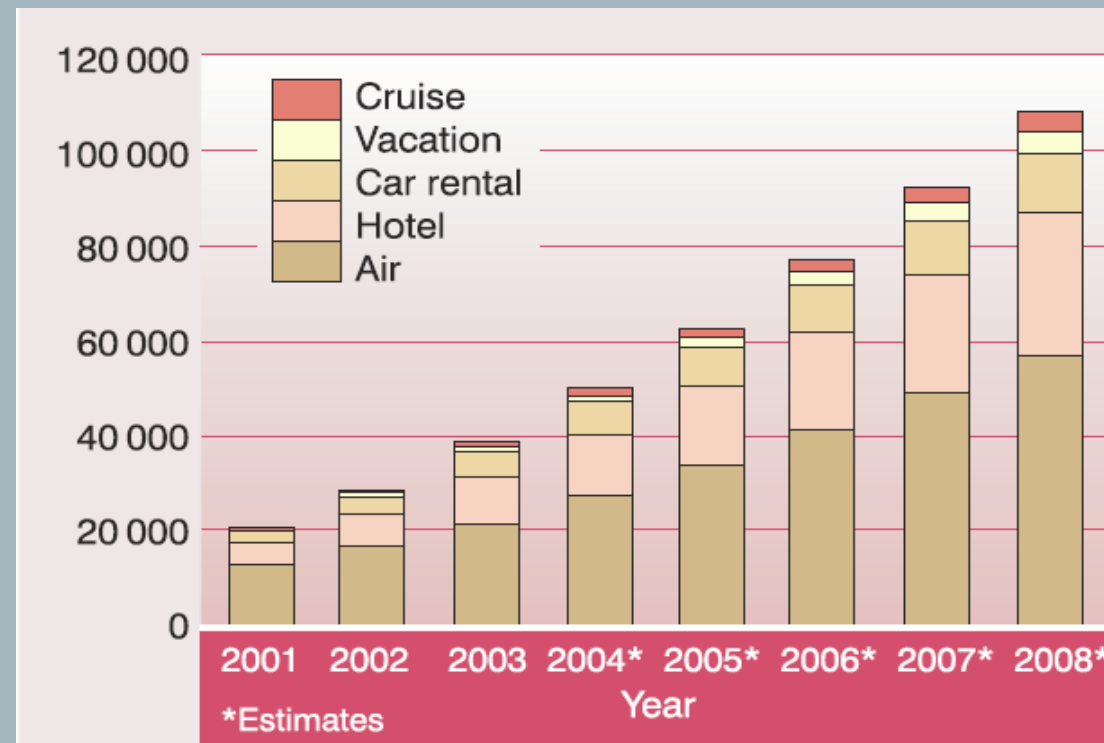
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- Internet is an essential and growing channel of distribution for tourist players
- Online travel forecast (US)



Tourism is important

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„Europe is the world leading tourist destination. But we need to do more to keep our competitive edge. Our proposals add European value to the efforts by member states. They will help to promote the EU as unique tourism destination in a more effective and co-ordinated way.” (G. Verheugen, 21. March 06)

- **New Policy Elements** (an excerpt)
 - Policy coordination
 - Better regulations
 - Improved use of EU financial instruments
 - European Agenda 21 for Tourism
 - Promoting European designations