



**TOP of EUROPE: WELFARE and ECONOMIC GROWTH**

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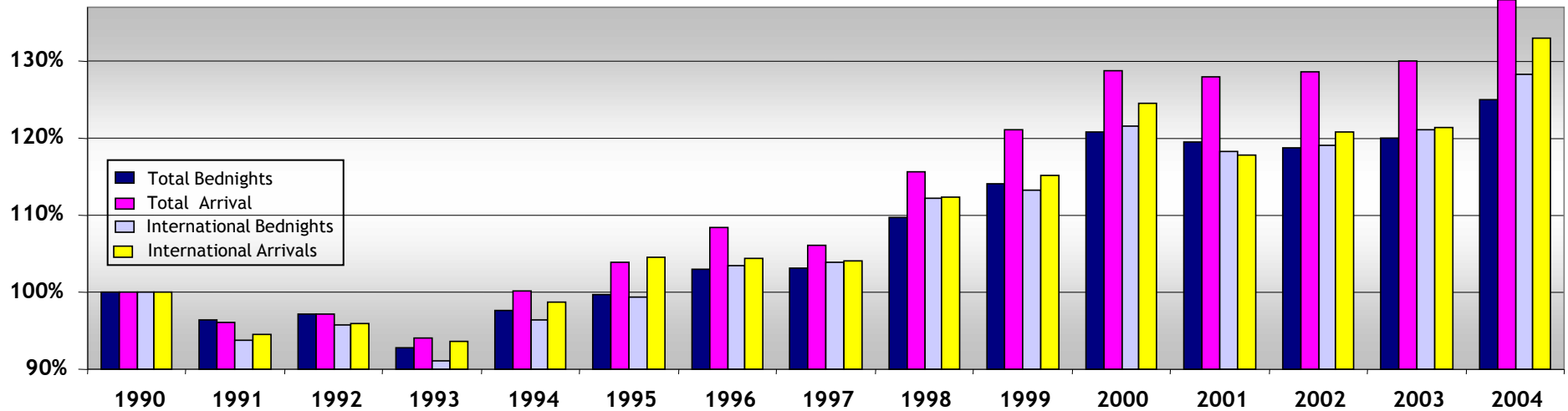
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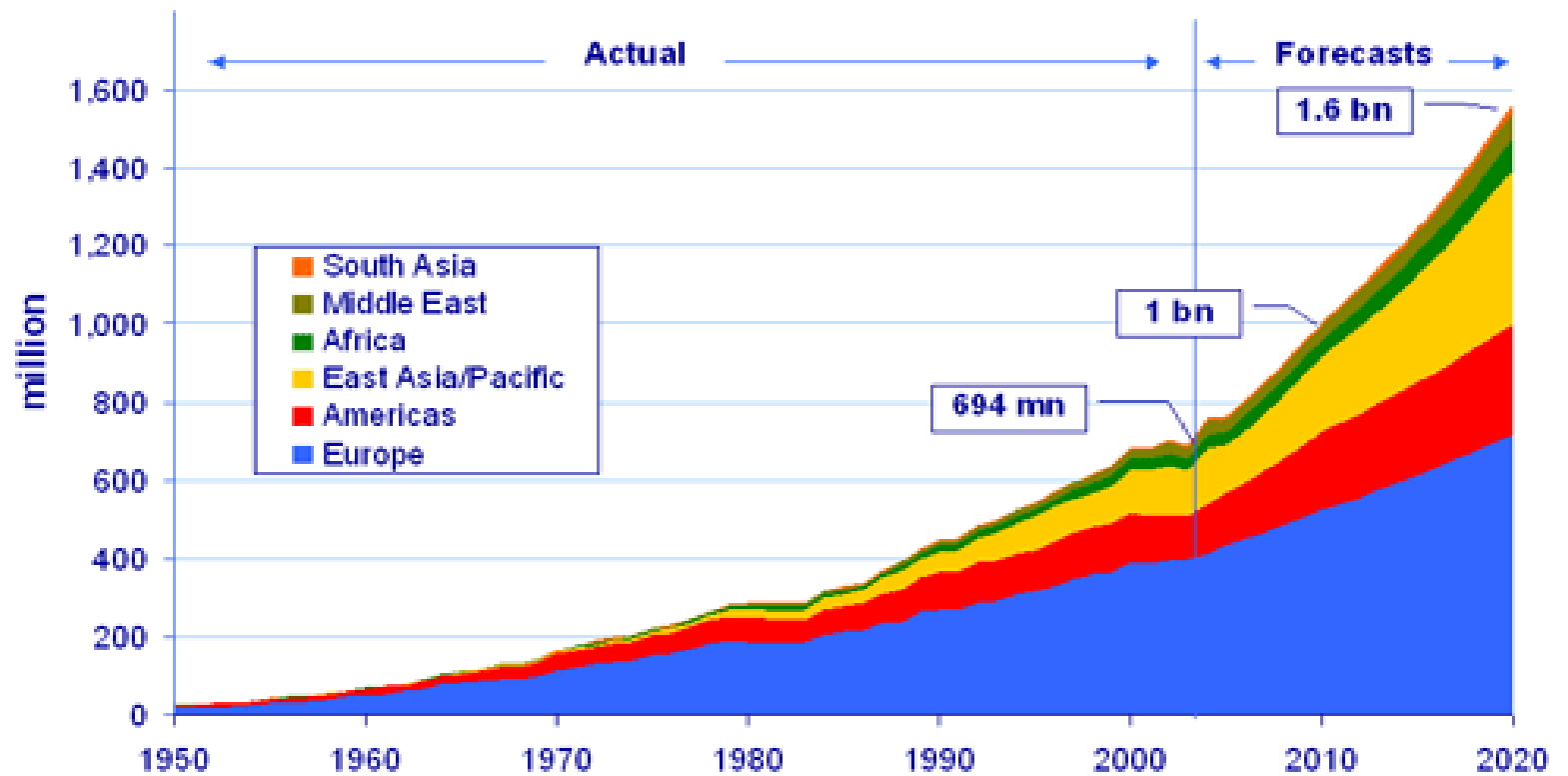
**The Swedish Research Institute of Tourism  
European Cities Tourism**



# Long term industry development

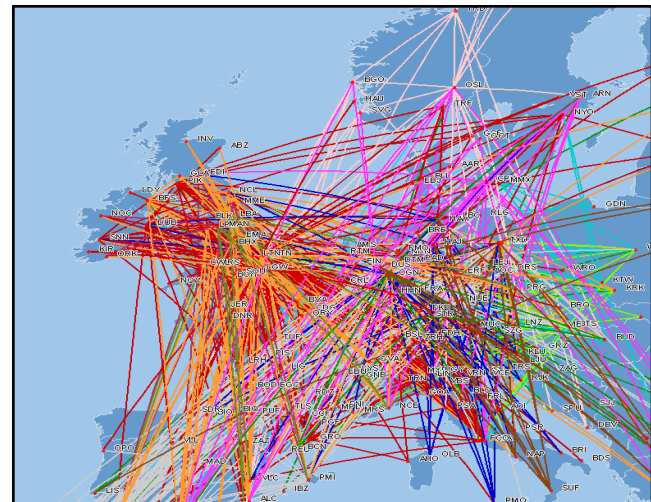
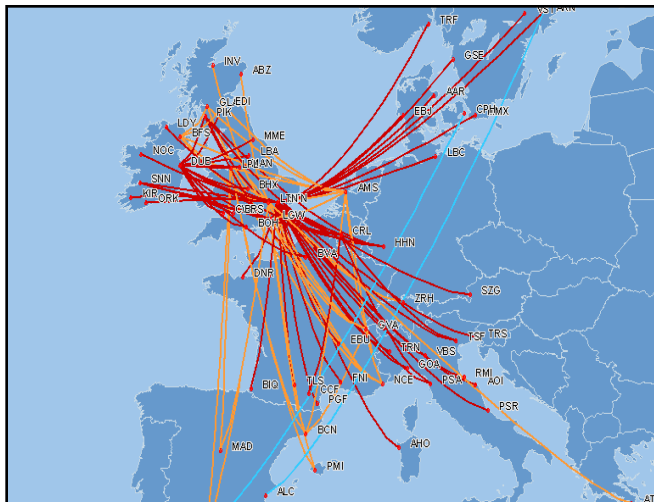
## I. Comparison of the hotel bednight and visitor arrival growth indices 1990-2004







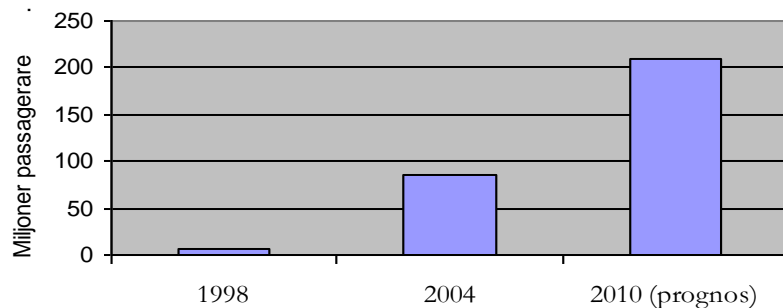
**2001** **2005**



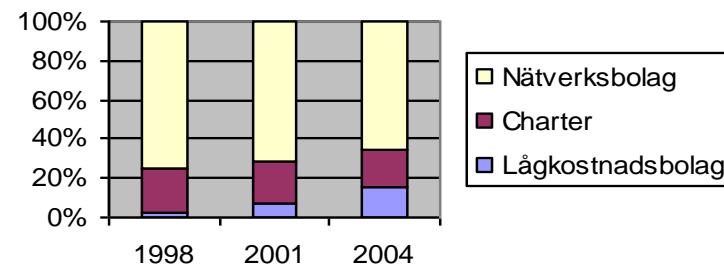
**LocCost-Passangers in Europe**

Källa: Advolar

**Market Share in Europe**

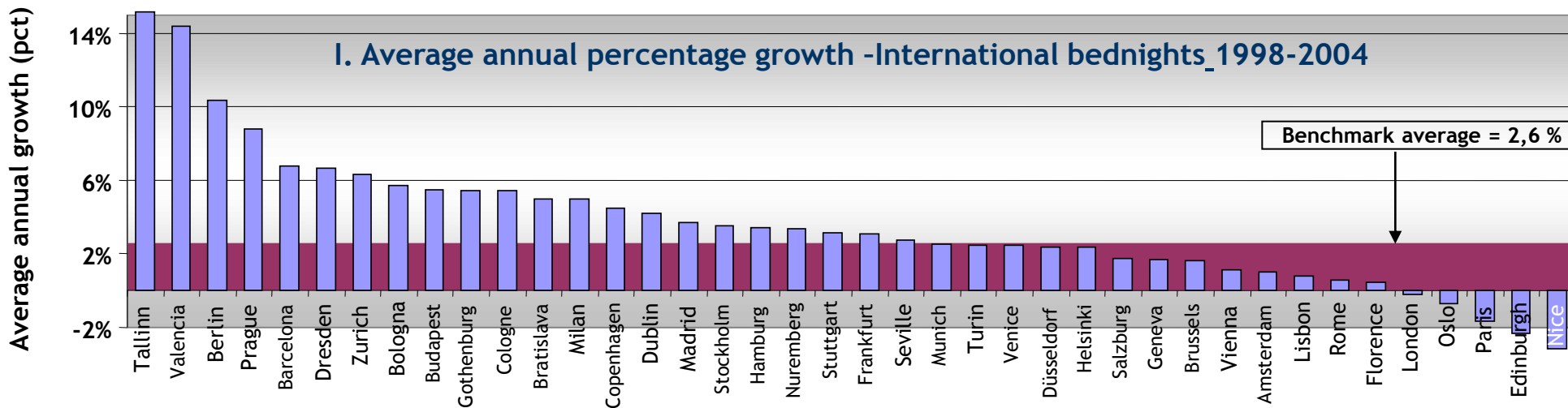


Källa: LFV/McKinsey

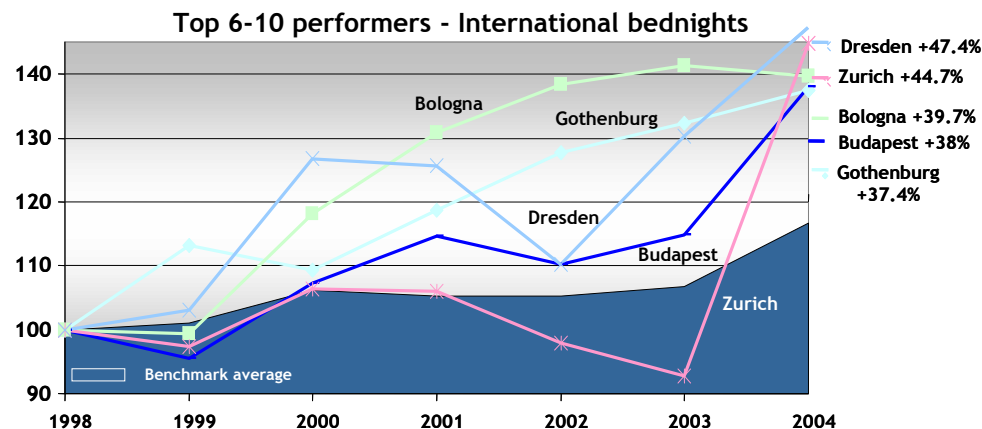
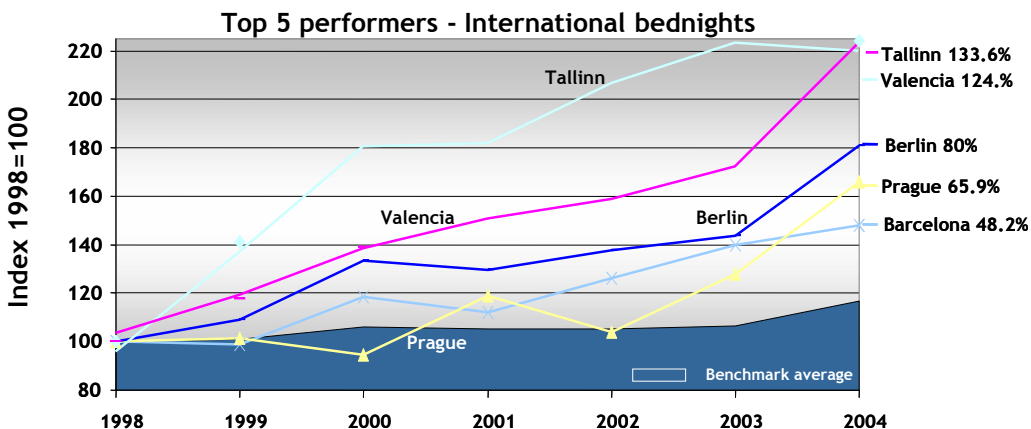


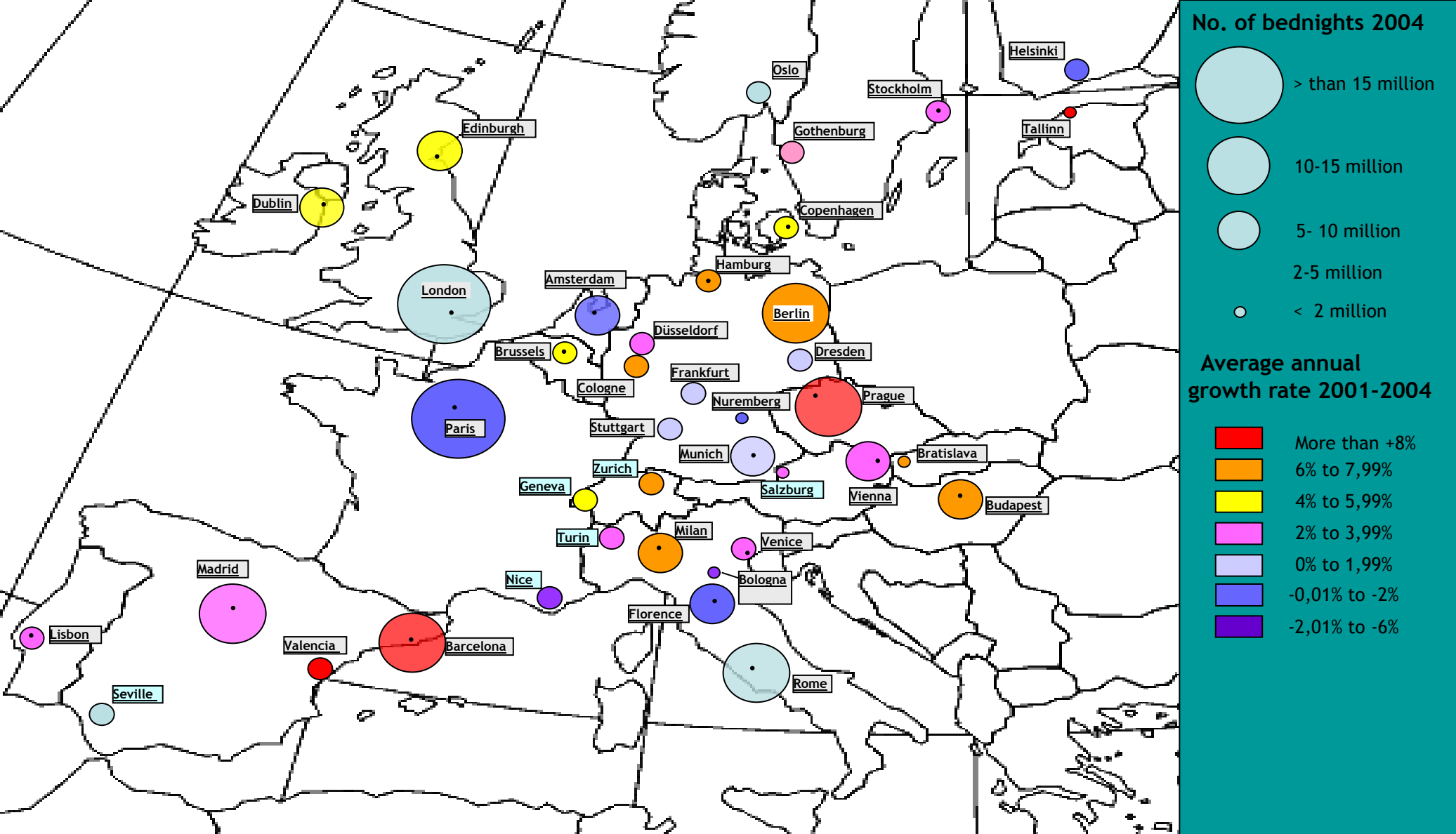
Källa: McKinsey

# 2.2 The Premier League Cities - International performance



### II. Top 10 city bednight growth index - International bednights 1998-2004



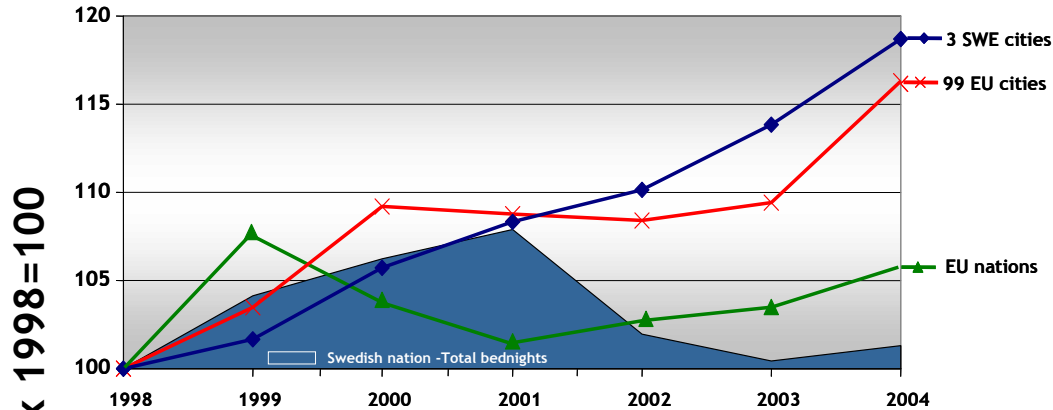


# Growth in Europe's Top-40 cities

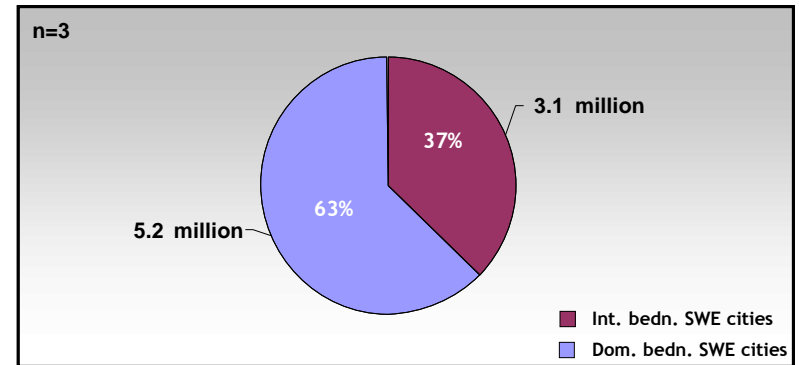


# Sweden national analysis 1998-2004

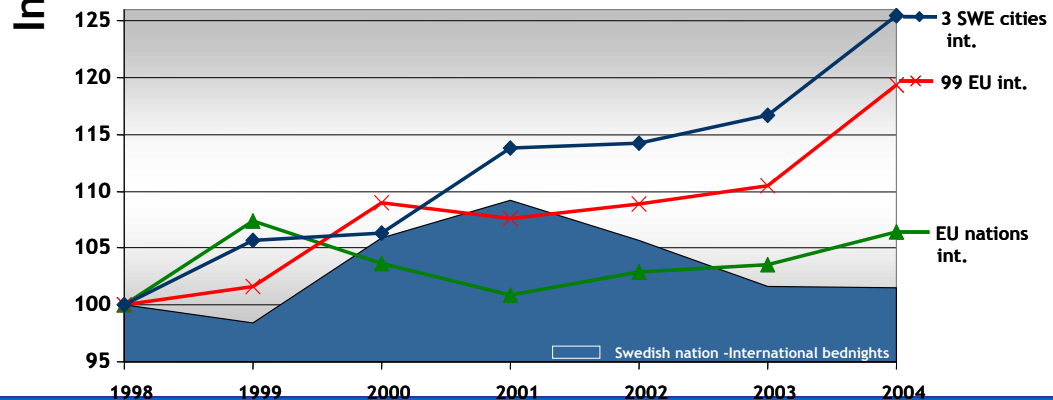
I. Index of total hotel bednights nation-wide vs. cities 98-04



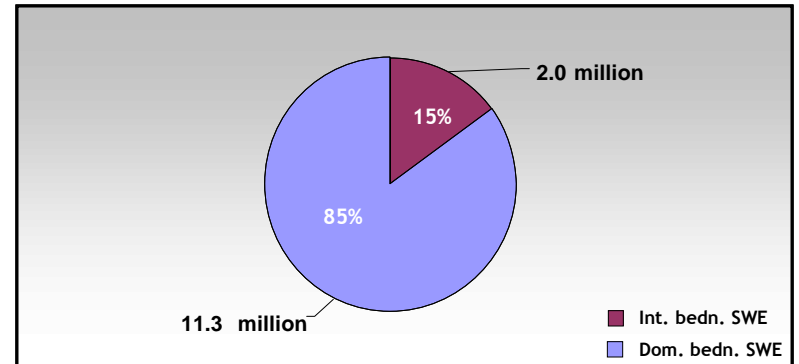
III. Domestic vs. international bednights in Swedish cities 2004



II. Index of international hotel bednights nation-wide vs. cities 98-04



IV. Domestic vs. international bednights in Sweden 2004



All nation-wide bednight figures are calculated exclusive bednights in cities



2,55% = 167 B

Export + 47 B

+ 127 000 fulltime E.



**The Tourism Industry**

ca 2,55 % of GDP

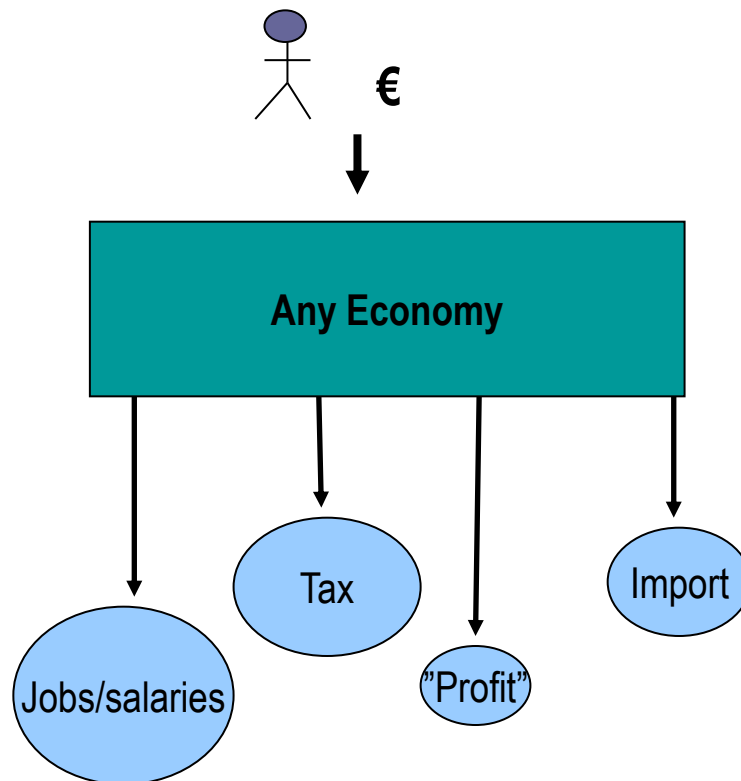
**The Tourism Economy**

ca 8 % of GDP

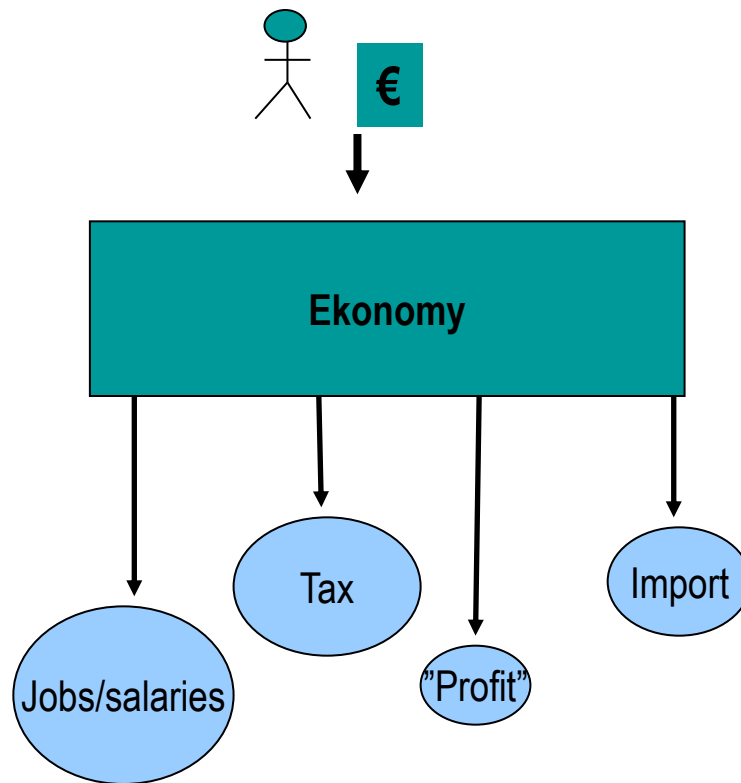
**The Experience Economy**

? % of GDP





- Catalyst for new jobs
- Type of jobs
- Export VAT
- "Secure Public Investment"



## EXPORT VALUE

- ex SAAB, 3,3 m sek.
- ex Ericsson, 3,1 m sek.
- Tourism, 1,3 m sek.
- Citytourism, 0,8 m sek



- Knowledge
- Investment Capital
- Continuity
- Creativity
- Leadership