

## About the OECD Tourism Committee

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The Organisation for Economic Co-operation and Development (OECD) provides a forum in which governments can work together to share experiences and seek solutions to common problems. We work with governments to understand what drives economic, social and environmental change. We measure performance and global flows of trade and investment. We analyse and compare data to guide policy and business decisions and to predict future trends. We set international standards on a wide range of things, from agriculture and tax to tourism.

The OECD is a recognised international player in tourism with a long-standing expertise in the field. Since 1948, the Tourism Committee has acted as the OECD forum for exchange and for monitoring policies and structural changes affecting the development of domestic and international tourism. The Committee provides policy-makers with concrete analysis of key challenges and policy responses that will shape tourism in the years to come. Member countries actively promote an integrated, whole-of-government approach by linking tourism to related policies such as economy, transport, trade, inclusive growth, employment, innovation, green growth, local development, SMEs and entrepreneurship. The Committee also supports work on tourism policy performance and evaluation through its tourism policy reviews.

The OECD guidelines on the economic and social measurement of tourism are internationally acknowledged standards. Since 1994, the Tourism Committee manages with Eurostat, the Statistical Office of the European Union, a Global Forum on Tourism Statistics which provides a platform for the exchange of views and experiences on developments in tourism statistics and application for policy and business. OECD tourism data are available through the new OECD data portal.

The Committee is expanding its global reach by co-operating closely with Partner countries and by deepening its engagement with the private sector. The aim is to more effectively share knowledge and good practices and contribute to shape global debates on tourism. The Committee has a strategic partnership with the European Commission, and has a long-standing history of co-operation with other organisations such as the World Tourism Organization, the United Nations Environment Programme, the International Labour Office and the Asia-Pacific Economic Cooperation. Examples of projects which have benefited from international co-operation include the Tourism Satellite Account, the travel and visa facilitation agenda, the 10YFP Sustainable Tourism Programme and the work on supporting quality jobs in tourism.

This note provides key information on the OECD Tourism Committee's policy agenda 2015-16 and policy mandate. It also lists our recent publications and studies on tourism and forthcoming events.

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## **PUBLICATION OECD TOURISM TRENDS AND POLICIES 2016**

The demand within governments and the tourism industry for in-depth analysis and robust information on tourism policies, data and issues is strong.

The flagship publication *OECD Tourism Trends and Policies* is an international reference and benchmark on how effectively countries are supporting competitiveness, innovation and growth in tourism. It sheds light on associated policies and practices and provides evidence on important economic and social tourism statistics. *OECD Tourism Trends and Policies* provides comparative knowledge through thematic chapters and country-specific policy and statistical profiles. The report covers around 50 OECD and Partner countries.

Part I of **OECD Tourism Trends and Policies 2016** will include 3 thematic chapters focusing on issues of primary importance for policy and/or business decision-makers. The first chapter will focus on tourism trends and policy priorities, including examples of good practice in policy development and implementation. Efforts to allow for more in-depth analysis and benchmarking of countries will be pursued, with synthesis tables of the main and most recent statistical indicators. Chapter 2 will focus on transport and tourism issues, while chapter 3 will focus on the impact of the sharing economy on tourism.

Part II of the publication will present country profiles showing i) the contribution of tourism to the national economy; ii) how tourism is organised and financed; and iii) the key policy initiatives and reforms supporting tourism growth. The statistical profile will provide key data on domestic tourism, inbound tourism, outbound tourism, employment, enterprises and internal tourism consumption.

### **Expected result**

- ✓ A publication on tourism trends and policies in OECD member and selected non-member economies (timeline February 2016).

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## MEASURING TOURISM PERFORMANCE AND TRENDS

**OECD tourism statistics** are now collected and processed using the OECD Statistical Information System, which helps to streamline and strengthen the production, storage and dissemination of statistics, with data easily accessible online, open and free, through OECD.Stat.

Building on this improved statistical environment, the activity will further strengthen tourism data collection and analysis as follows:

- A comprehensive set of data will be collected once every two years for the publication *OECD Tourism Trends and Policies*. Key data will cover domestic tourism, inbound tourism, outbound tourism, employment, enterprises and internal tourism consumption.
- A limited set of data, to reduce the burden put on countries to a minimum, will be updated annually for all OECD members to produce an online synthesis and communiqué on recent tourism trends in the OECD area.
- In parallel, the OECD Secretariat will explore a pilot data collection exercise linked to the implementation of the Tourism Satellite Account.

**Understanding and measuring competitiveness in tourism** is a major consideration for policy makers to inform decision making. The OECD has developed a framework “Indicators for Measuring Competitiveness in Tourism: A Guidance Document” which includes a set of indicators to evaluate, measure and analyse tourism competitiveness at country level. The OECD will move forward with the pilot testing of the core indicators identified in the measurement framework, gather evidence of country practices, methodologies and examples of application, and based on evidence review the application and the value of the indicators, which may lead to the building of a *Pilot OECD scoreboard on tourism competitiveness data and policies*.

### Expected results

- ✓ An updated database of tourism indicators underlying OECD Tourism Trends and Policies publication (ongoing).
- ✓ More timely data on tourism with an annual press release on tourism statistics and open data available on OECD.Stat (ongoing).
- ✓ A statistical/analytical report providing evidence on the measurement of competitiveness in tourism and guidance for improvement (timeline end 2016).

## **INTER-MODAL CONNECTIVITY FOR DESTINATIONS**

Transport is an important enabling factor for tourism development. Accessibility is key for the competitiveness of a destination (a country, region or city) in the global tourism market. The growing number of travellers creates numerous challenges in terms of transport infrastructure, border crossing, inter-modality, information for travellers and inter-operability of technologies with tourism service providers. Major hubs (airports, train stations, ports) in particular need to be multi-modal and well connected to city and tourism centres to support sustainable tourism development, avoid congestion problems and provide business/leisure visitors, including those with special accessibility needs, with a satisfactory tourism experience. Major hubs represent an entry door to the destination and a unique opportunity to guide the journey of national and foreign visitors. The capacity of hubs, as major activity centres, to create employment (e.g. through travel retail) and to generate local economic development benefits is significant. They do not only serve the visitors economy, but contribute to the well-being of residents and to the promotion of the economic place.

The work on **inter-modal connectivity for major hubs: a tourism perspective** will i) analyse the challenges to providing better connectivity and inter-modality from major hubs to tourism destinations; ii) review the role of technologies in facilitating inter-modal connectivity (e.g. for information and reservations systems); iii) examine how integrated transport and tourism responses can support better connectivity with a focus on good policy and industry practices; and iv) review how improved transport and tourism infrastructure and services can enhance local economic development and the return on investment for countries/regions. The OECD will work closely with the International Transport Forum (ITF) to undertake analytical and statistical work to better understand the level of integration of tourism and transport policies/strategies in member and partner countries.

Recent work on travel facilitation has focused on identifying smarter approaches to the design of temporary entry policies, including visas, which can support tourism and economic growth. The work on **Measuring progress on travel facilitation initiatives** will i) develop a set of travel facilitation performance indicators to measure progress on facilitating cross-border travel; ii) identify good practices; and iii) propose guidelines to support policy design and implementation. The activity will take a visitor experience perspective.

### **Expected results**

- ✓ An analytical report on effective policies supporting mobility through inter-modality in tourism (timeline end 2016).
- ✓ Guidelines for measuring travel facilitation initiatives (timeline 2016).

### **INNOVATIVE FINANCING APPROACHES FOR TOURISM SMEs**

Better access to finance for tourism businesses can support a more competitive and sustainable industry. OECD work indicates that conditions to access finance remained tight for SMEs and entrepreneurs in most countries. Over recent years, SMEs have been facing more severe credit conditions than large enterprises, and equity financing was severely affected by the financial crisis. Governments responded to the global financial crisis and its effects on SME financing with a variety of instruments.

The tourism industry structure is dominated by SMEs, with a large proportion of small enterprises (e.g. hotels and restaurants). The financing of tourism SMEs is affected by a number of variables such as the shortage of capital for business development, the operating environment for the company and its profitability. The shortage of capital for a company is a major obstacle for the development of the business proposal, affecting jobs and improved training, market access, digital information and distribution or higher quality standards.

The report on **innovative financing approaches for tourism SMEs** will i) analyse the current issues/barriers facing tourism SMEs in their effort to access finance; ii) review the lending and credit conditions for tourism SMEs and entrepreneurs; and iii) identify the mechanisms of financial innovation (venture capital, business angels, etc.) used in the financing of the tourism activity.

#### **Expected result**

- ✓ A handbook on innovative financing approaches to support tourism SMEs (timeline end 2016).

### **POLICY FRAMEWORK FOR TOURISM MARKETING AND PROMOTION**

Policies for promotion and marketing in tourism are being affected by reduced public funding and are challenged by a very competitive global tourism market, new governance arrangements, and developments in the digital economy (e.g. social media platforms, internet providers). New models for linking tourism policy, tourism marketing and product development, including digital strategies, are being explored in a number of countries. National and regional tourism organisations and administrations have to adjust to these developments and challenges to put in place policies and programmes that will efficiently and effectively drive demand.

The report analysing the **policy framework for tourism marketing and promotion** will i) review existing models linking tourism marketing and product development, including the effectiveness of digital strategies; ii) examine the funding models for marketing activities, including public-private and public-public partnerships; and iii) identify successful co-operative programmes with mutually acceptable and workable models.

#### **Expected result**

- ✓ A review of the policy framework for tourism marketing and promotion (timeline end 2016).

### **LARGE-SCALE EVENTS AND THE VISITOR ECONOMY**

Large-scale events (trade, sports, culture) are a dynamic and fast-growing sector which offers obvious synergies with tourism and can stimulate the upgrading of infrastructure and the emergence of new partnerships for financing sport, tourism, culture and leisure facilities. Large-scale events represent a vehicle for economic (e.g. tourism) growth, job creation, branding, well-being, urban regeneration and regional/local development in host countries, regions and cities.

Well managed events will contribute to the structural expansion of the visitor economy and to supply chain development, and related investments will represent a unique opportunity to rethink the destination and to support the development of modern infrastructure. Challenges for hosts include funding, governance, and impact assessment (economic, social and environmental). The positive effects will vary according to how much energy and capital is invested in securing a long-term legacy of the event. The focus will be on events with sufficient size to promote changes in terms of the dynamics of the territories and with impacts in terms of tourism development.

The report analysing the impact of **large-scale events for the visitor economy** will i) analyse the direct (in terms of GDP, growth and employment) and indirect (through tourism, spill-over effects on regional/local development and impact on higher attractiveness of the place) contributions of large-scale events; ii) review the policy implications for national and local governments and the lessons to be drawn based on evidence collected in countries which recently organised large-scale events; iii) provide recommendations on how policy makers could act to increase the expected benefits; and iv) identify the major elements to be considered in a post-event evaluation.

#### **Expected result**

- ✓ A policy report analysing the economic impact of large-scale events on the visitor economy (timeline mid 2016).

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### **NATIONAL TOURISM POLICY REVIEW OF MEXICO**

The **Tourism Policy Review of Mexico** will provide an independent assessment of tourism-related policies programmes and plans to support sustainable tourism development in Mexico. The review will analyse and evaluate tourism policy in light of current trends, issues and challenges and identify opportunities with strong potential for development and economic growth. It aims to identify areas where recommendations from OECD could help Mexico to strengthen its tourism sector.

The review will i) examine the size, structure, performance and competitiveness of tourism in Mexico; ii) analyse how tourism policies are developed, implemented and enforced and the governance arrangements in place to facilitate inclusive and sustainable tourism development; iii) carry out a systematic analysis of policies and strategies related to transport and connectivity, tourism-related infrastructure and product development, and investment and SME financing, along with sustainability and gender; and iv) identify good practice examples from Mexico and other countries.

The in-depth analysis and concrete policy recommendations will inform the Mexico Tourism Cabinet's policy agenda, activities and action plan.

#### **Expected result**

- ✓ A national tourism policy review of Mexico (timeline mid 2016).



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## TOURISM POLICY REVIEWS AT NATIONAL OR LOCAL LEVEL

This part of the programme of work offers a space for countries and regions to undertake policy reviews and for the OECD to provide targeted policy advice to member and partner countries and organisations. The reviews are highly relevant for gaining insights into the design and effectiveness of tourism policies and programmes in different social, economic and geographical contexts.

The objective of the tourism policy reviews is to enhance tourism performance, competitiveness and innovation, to increase knowledge about tourism policy design and evaluation, to diffuse evidence-based lessons and good practices and to strengthen policy coherence and linkages.

The **country tourism policy reviews** provide: i) a diagnosis of the vitality and performance of the tourism sector at national and/or local levels; ii) an assessment of the strengths of existing national and local tourism policies and challenges for their future development; and iii) recommendations for future policy improvements. They contribute to support reforms in tourism. The scope of the country review is determined with the national or local partner in close co-operation with the Tourism Committee. Reviews build upon a common OECD analytical, but flexible, framework to evaluate tourism policies. The assessment phase includes a discussion of the review report and findings, and a peer review process with the Tourism Committee.

The **thematic tourism policy reviews** provide an in depth analysis and concrete policy recommendations on specific areas of intervention linking this area with the broader tourism policy framework. The reviews often present country experiences, innovations and good practices. They contribute to policy coherence by analysing linkages between tourism and other areas (e.g. food, culture, creative industries, SMEs). The identification of the concrete policy orientations are examined with the Tourism Committee.

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### **MANDATE OF THE OECD TOURISM COMMITTEE 2012-2016**

The Tourism Committee will support Members and, as appropriate, non-Members to:

- a) maximise the economic, social and environmental benefits of tourism through medium and long-term strategic development, soundly-developed tourism policy and an integrated governmental approach promoting a greater coherence between tourism and other policies (e.g. education, environment, innovation, labour, safety and security, trade or transport);
- b) promote, in a globalisation and decentralisation context, sustainable tourism development as a source of economic growth, job creation and development in both major centres and regional areas;
- c) improve the competitiveness and the image of destinations to make them more attractive to the local population, visitors and investors, for the benefit of the whole economy;
- d) design, adopt and implement policy reforms in tourism to enhance long-run productivity and growth performance;
- e) contribute to the advancement of international co-operation in the tourism sector.

To achieve these objectives, the Tourism Committee will be responsible for analysing and developing tourism-related policy recommendations. In the context of this mission, the Tourism Committee will:

- a) prepare tourism policy analysis and evaluation, identify good policy and business practices to meet major challenges, provide policy advice and be a clearing house for information on tourism policy;
- b) share knowledge and experiences to identify best practices on tourism-related policies and strategies, particularly in the areas of competitiveness, consumer protection, e-commerce, governance, innovation, labour, legislation, local development, productivity and skills, SMEs and entrepreneurship, sustainability, trade and taxation;
- c) carry out in-depth tourism industry and market analysis to help Members, non-Members and the travel and tourism industry realise the overall economic, social and environmental benefits of tourism;
- d) improve the measurement of international and domestic tourism services by addressing government and industry information needs; promoting the tourism satellite account; and contributing to the dissemination and effective use of high-quality data on tourism economics for business and policy analysis and decision-making processes, including through the promotion of tourism intelligence networks;
- e) provide a forum for dialogue, innovations and benchmarking on tourism issues and policies and disseminate results through the OECD website, publications and thematic conferences.

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### **MANDATE OF THE OECD TOURISM COMMITTEE 2012-2016 (Cont'd)**

The actions undertaken by the Tourism Committee should be guided by the following operating principles. The Tourism Committee will:

- a) contribute to implementing the strategic objectives of the Organisation; develop, as appropriate, active links to the Organisation's horizontal programmes; maintain close working relations with other relevant bodies in the Organisation to complement and support analysis and discuss tourism aspects of questions raised; and, where appropriate, undertake joint projects;
- b) develop partnerships with the private sector and other stakeholders to build a shared vision of strategic developments and, where appropriate, organise forums to explore timely issues and develop policy recommendations;
- c) engage non-Members in support of the OECD's overall strategy, in accordance with the Global Relations Strategy of the Tourism Committee, and share with them the results of its work;
- d) contribute to the promotion of the importance of tourism in the global economy, co-operate closely with other international organisations active in the field of tourism and work in synergy to ensure that activities are complementary.

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## **MANDATE OF THE GLOBAL FORUM ON TOURISM STATISTICS**

The Global Forum on Tourism Statistics is jointly managed by the OECD and Eurostat, the Statistical Office of the European Union.

The Global Forum on Tourism Statistics provides a unique platform for the regular exchange of views and experiences on developments in tourism statistics and application for policy and business, both within the European Union (EU), in other OECD countries and in selected non-Members.

The Global Forum on Tourism Statistics meets once every two years at the invitation of a hosting country.

The Global Forum on Tourism Statistics discusses major issues concerning the establishment of harmonised tourism statistics in an environment that strengthens co-operation between governments, the private sector, researchers, universities, OECD/EU Members and non-Members and international organisations.

The objectives of the Global Forum on Tourism Statistics are:

- Broad-based participation by experts and researchers from EU/OECD Members, some non-Members, all sectors of the tourism industries and universities;
- Presentation and discussion of selected case studies dealing with the implementation of statistical methodologies, definitions and classifications as well as with the development of new statistical tools;
- Sharing of ideas, experiences, concepts as a basis for developing harmonised tourism statistics and concrete proposals to improve the definition and the measurement of tourism in the economy;
- Identification of alternative sources of information and promotion of new information technologies as a way to diminish the burden on tourism enterprises and to improve the dissemination of statistics to all partners;
- Development of integrated systems of tourism statistics and socio-economic indicators to present a global picture of the tourism sector, particularly to governments and to establish links with the rest of the economy.

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## **PUBLICATIONS AND STUDIES**

**Supporting quality jobs in Tourism**, 2015, OECD Tourism Papers 2015/02, forthcoming.

**Effective Policies for Tourism Growth**, 2015, OECD Tourism Papers 2015/01, forthcoming.

**Tourism and the Creative Economy**, 2014, publication.

**OECD Tourism Trends and Policies 2014**, 2014, including chapters on “Tourism trends and policy priorities”, “Travel facilitation, tourism and growth” and “Taxation and tourism”, publication.

**Indicators for Measuring Competitiveness in Tourism**, 2013, OECD Tourism Papers 2013/02, available online.

**Green Innovation in Tourism Services**, 2013, OECD Tourism Papers 2013/01, available online.

**OECD Tourism Trends and Policies 2012**, 2012, including chapters on “Governance of tourism in OECD countries”, “A Framework for the Evaluation of Tourism Policies and Programmes” and “Education and Training for Competitiveness and Growth in Tourism”, publication.

**Food and the Tourism Experience**, 2012, publication.

**Climate Change and Tourism Policy in OECD Countries**, in partnership with UNEP, 2011, publication.

**Italy – Review of Issues and Policies**, 2011, publication (also available in Italian).

**Sustainable tourism and local development in Apulia region (Italy)**, 2010, study with the OECD LEED programme.

**OECD Tourism Trends and Policies 2010**, including chapters on “Tourism 2020: Policies to Promote Competitive and Sustainable Tourism” and “Tourism Satellite Accounts: Data for Business and Policy Development”, publication.

**The Impact of Culture on Tourism**, 2009, publication.

**Tourism Satellite Account: Recommended Methodological Framework 2008**, EUROSTAT, OECD, United Nations Statistics Division (UNSD) and World Tourism Organization, publication available online at <http://unstats.un.org/unsd>.

**The Riva Del Garda Action Statement for Enhancing Competitiveness and Sustainability in Tourism**, 2008.

**Local Development Benefits from Staging Global Events**, 2008, publication by the OECD LEED programme.

**Tourism in OECD Countries 2008: Trends and Policies**, 2008, including chapters on “New Paradigm for International Tourism Policy”, “Enhancing the role of SMEs in the Global Tourism Industry” and “Services Trade Liberalisation and Tourism Development”, publication.

**Climate Change in the European Alps: Adapting Winter Tourism and Natural Hazards Management**, 2007, publication by the Environment Directorate.

**Fostering SME and Entrepreneurship Development in the Tourism Sector in Bulgaria**, 2007, study with the OECD LEED programme.

**Innovation and Growth in Tourism**, 2006, publication.

**Investment and Entrepreneurship Development in the Tourism Sector: the Case of the Autonomous Republic of Crimea**, Ukraine, 2005, study with the OECD LEED programme.

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### **FORTHCOMING EVENTS**

95<sup>th</sup> Session of the OECD Tourism Committee, 31 March-1 April 2015, Paris, France, by invitation only.

Korea-OECD Conference on culinary tourism at the Expo Milan 2015, 24 June 2015, Milan, Italy

96<sup>th</sup> Session of the OECD Tourism Committee, 13-14 October 2015, Paris, France, by invitation only.

14<sup>th</sup> Global Forum on Tourism Statistics, Q4 2016, date and location to be determined, by invitation only.

97<sup>th</sup> Session of the OECD Tourism Committee, 5-6 April 2016, Paris, France, by invitation only.

98<sup>th</sup> Session of the OECD Tourism Committee, 6-7 October 2016, Paris, France, by invitation only.

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### **TO FIND OUT MORE**

Contact Mr. Alain Dupeyras, Head of Tourism, OECD, [alain.dupeyras@oecd.org](mailto:alain.dupeyras@oecd.org)

Visit the OECD website [www.oecd.org/cfe/tourism](http://www.oecd.org/cfe/tourism)

Visit the OECD data portal <http://dotstat.oecd.org>