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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. The OECD works with governments to understand what drives economic, social and environmental change. The OECD analyses and compares data to guide policy and business decisions and to predict future trends.

The OECD is a recognised international player in tourism. Since 1948, the Tourism Committee analyses and monitors policies and structural changes affecting the development of domestic and international tourism. Tourism is located in the [OECD Centre for Entrepreneurship, SMEs, Local Development and Tourism](#). The Committee provides policy-makers with concrete analysis of key challenges and policy responses that will shape tourism in the years to come. The Committee actively promotes an integrated, whole-of-government approach linking tourism to policies such as economy, investment, 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. The Global Forum on Tourism Statistics provides a platform for the exchange of views and experiences on developments in tourism statistics and use 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 for 2017-18. It also lists the Committee's recent publications and studies on tourism and forthcoming events.

OECD Tourism Trends and Policies 2018

The demand within governments and the tourism industry for in-depth analysis and robust information on tourism policies, data and issues is strong. The publication *OECD Tourism Trends and Policies* is an international reference and benchmark on how effectively countries are supporting competitiveness, sustainability, innovation and growth in tourism. It sheds light on policies and practices associated, 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.

OECD Tourism Trends and Policies 2018 includes thematic chapters focusing on topical issues of primary importance for policy and/or business decision-makers, and analysing the latest tourism policy developments. 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. The themes for the thematic chapters are determined by the Tourism Committee.

The country policy profiles present 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 country statistical profiles provide key data on domestic tourism, inbound tourism, outbound tourism, employment, enterprises and internal tourism consumption.

Measuring tourism developments and impacts

[Tourism statistics](#) are collected and processed using the OECD Statistical Information System. All tourism data are accessible online, open and free, through the OECD Data Portal. This includes data on domestic tourism, inbound tourism, outbound tourism, employment, enterprises and internal tourism consumption.

Building on this improved statistical environment, the activity will further strengthen tourism data collection and analysis, and the timeliness of the data. The pilot testing of selected core indicators of the measurement framework “[Indicators for Measuring Competitiveness in Tourism: A Guidance Document](#)” will be pursued to gather evidence of country practices, methodologies and examples of application.

The OECD Working party on Tourism Statistics supports the implementation of the statistical agenda of the Tourism Committee.

Analysing megatrends to better shape the future of tourism

Demographic change, rising inequality, climate impacts, globalisation, digitalisation, increasing mobility, geopolitical factors, working/leisure time balance, safety and security are some of the important factors and trends that will fundamentally change the environment for tourism in the years to come.

Building on OECD work on megatrends, this activity will analyse megatrends to construct various scenarios for the future of tourism that can be used to inform decision-making by governments and industry. The review will feed a process of strategic planning and policy design, and promote collaborative, proactive and integrated policy responses; so country engagement throughout this process will be critical.

Core questions to be addressed will include: how do megatrends influence tourism demand and consumption? What are the impacts of megatrends on tourism supply and infrastructure? What do megatrends mean for medium to long-term investment strategies? How do megatrends affect the future of jobs in tourism?

Analysing investment trends in tourism for effective policy responses

Effective and coherent policies for public investment in tourism are key to promoting sustainable and inclusive growth, to boost the level and the quality of infrastructure, to support destinations in their transition towards low-carbon development, and increase private investment, thus facilitating the development of SMEs.

This activity will track and analyses investment trends in tourism, explore barriers (small scale of many tourism operations, seasonality, lack of greenfield investment sites, uncertainty about return on investment) and highlight innovative and effective policy responses. It will provide a platform to collect and exchange best practices on investment in tourism, including methods to measure the impacts of interventions and progress.

Core questions to be addressed include: is there sufficient quality tourism infrastructure? What are the main barriers to tourism investment? How to best address the emerging investment needs of the tourism industry? How is tourism investment identified as a priority in countries?

Providing new evidence on the value of trade in tourism services

The globalisation of tourism is significant. Since 1950 international tourism experienced a spectacular growth, surpassing 1.2 billion arrivals in 2015. Nowadays, almost all countries in the world do have a tourism industry and are engaged in the global tourism market. There is a need to build new evidence to understand better the challenges presented by the globalisation process and the contribution of tourism.

Core questions to be addressed will include: does tourism create additional trade? Is tourism trade 'high or low' in value –added content? How does tourism compare to the rest of the economy?

The activity will provide data and analysis on how much tourism adds to domestic economies by expanding the OECD-World Trade Organization (WTO) Trade in Value-Added (TiVA) database to cover tourism services, and by combining these data with Tourism Satellite Account (TSA) data. The work will explore the role of tourism services in international trade and for development, and provide insights into the value added created by each country in the production and consumption of tourism services in a globalised economy. Links will be established with OECD work looking at the impact of global value chains and trade in value-added on jobs and productivity (for hotels and restaurants).

Tourism policy reviews

Tourism Policy 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 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. Tourism policy reviews are undertaken under the leadership of the Tourism Committee.

The **national tourism policy reviews** (*Mexico, Italy*) usually include: i) the collection of information on tourism economic performance and tourism-related policies, programmes and regulations (design and implementation); ii) a detailed analysis of tourism-related policies, including a focus on two specific policy areas and a comparative analysis; iii) the formulation of recommendations; and iv) the release of a report and communication activities.

The **local tourism policy reviews** analyse local tourism strategies that drive development at the regional and local level. They include data collection and analysis, local and national roundtables with stakeholders, and a final country report to provide concrete advice to policy-makers on the implementation of effective tourism strategies to support tourism development at the local level.

The **thematic tourism policy reviews** ([*Tourism and the Creative Economy*](#), [*Food and the Tourism Experience*](#), [*Impact of Culture on Tourism*](#)) provide in-depth analysis and concrete policy recommendations on a specific programme of action and contribute to policy coherence by analysing linkages between tourism and other areas (e.g. agriculture, culture, sports, transport). Themes such as “Social media and tourism policy”, “Innovation in Tourism”, “Urban Policies and Tourism” are potential topics for thematic reviews.

Mandate of the OECD Tourism Committee

The Tourism Committee (hereafter the “Committee”) has the following mandate:

I. Objectives

The objectives of the Committee are to:

- 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 greater coherence between tourism and related policies;
- Promote the shift to sustainable tourism consumption and production which contributes to sustainable destinations, involves and benefits local communities, creates jobs and promotes development;
- Improve the competitiveness and the attractiveness of destinations for the benefit of residents, visitors and investors, and promote tourism as a tool for economic diplomacy and development;
- Support the design, adoption and implementation of tourism policy reforms to enhance long-run productivity, growth performance and inclusiveness;
- Promote mutual understanding of tourism policy developments and contribute to the advancement of international co-operation in tourism.

II. Working methods

To achieve these objectives, the Committee shall:

- Carry-out high-profile, influential policy analysis, evaluations and peer-reviews at national, local and thematic level to promote the effective implementation of best practices and integrated approaches ensuring linkages and coherence with related policies;
- Identify innovative approaches, trade-offs and synergies, and linkages between various key policy perspectives for improved travel and tourism policies;
- Maintain and develop robust, comparable and timely statistical indicators to strengthen evidence-based analysis and policy performance, providing relevant tourism data online for free;
- Provide a forum for dialogue, innovation and benchmarking on tourism issues and policies, introducing a global and cross-sectoral perspective;
- Enhance its visibility and impact, and develop targeted policy communications utilising a variety of tools, including publications, policy briefs, OECD Tourism Papers, OECD website, social media channels, and policy events.

Mandate of the OECD Tourism Committee (Cont'd)

III. Co-operation arrangements

The Committee shall:

- Collaborate with other relevant bodies of the OECD on cross-cutting issues related to tourism, including transport, trade, investment, crisis management, inclusive growth, digital economy, environment, innovation, skills, local development, SMEs and entrepreneurship;
- Co-operate, as appropriate, with the Business and Industry Advisory Committee and the Trade Union Advisory Committee to the OECD, tourism industry organisations, as well as the civil society and academia;
- Engage non-Members, as appropriate, in the analytical work and policy dialogue of the Committee in accordance with the Committee's Global Relations Strategy and the OECD's Global Relations priorities;
- Co-operate with other international organisations such as the United Nations World Tourism Organization and the Asia-Pacific Economic Cooperation, as determined by the needs of the Committee's work.

Mandate of the OECD Working Party on Tourism Statistics

The Working Party on Tourism Statistics (hereafter the “Working Party”) shall assist the Tourism Committee in its work related to statistics, evidence-based analysis and policy performance.

In accordance with the priorities set out by the Tourism Committee, the objectives of the Working Party are to:

- Provide a platform for discussion and exchange of information on current issues concerning the development of tourism statistics (i.e. methodology, data collection, data analysis, dissemination) with a view to adapting them to the evolving policy requirements of the Tourism Committee and other users, and optimising their relevance, accessibility, and usability;
- Improve the quality, the comparability and the timeliness of tourism statistics in line with OECD good practices, and support the collection and dissemination of comprehensive tourism statistics;
- Promote synergies for data collection (e.g. joint questionnaires), to enhance global data sharing and to develop common methodologies and definitions;
- Support the implementation of the Tourism Satellite Account: Recommended Methodological Framework (TSA), and identify best practices for implementing and using TSA at national and regional level;
- Further improve knowledge and information on tourism economics, including through new methodological approaches to measuring competitiveness in tourism and the value of trade in tourism services;
- Contribute to the harmonisation of tourism-related statistical systems and support the integration of tourism statistics in the global statistical system (e.g. national accounts, trade in services, environment, and employment).

The Working Party shall co-operate closely with OECD statistical bodies, notably the Committee on Statistics and Statistical Policy (CSSP), Members and Partners’ national statistical authorities, and international organisations active in methodological developments and data collection, analysis and dissemination in tourism.

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.

Publications and Studies

OECD Tourism Policy Review of Mexico, 2017, publication (forthcoming in January 2017).

An OECD Review of Statistical Initiatives Measuring Tourism at Subnational Level, 2016, OECD Tourism Papers 2016/01, available online.

OECD Tourism Trends and Policies 2016, 2016, including chapters on “Tourism trends and policy priorities”, “Seamless transport to enhance the visitor experience”, “Policies for the tourism sharing economy”, publication.

Supporting Quality Jobs in Tourism, 2015, OECD Tourism Papers 2015/02, available online.

Effective Policies for Tourism Growth, 2015, OECD Tourism Papers 2015/01, available online.

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.

OECD Environmental Performance Reviews: Iceland 2014, 2014, including a chapter on “Tourism and environment”, 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 OECD 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.

Forthcoming events

99th Session of the OECD Tourism Committee, 28-29 March 2017, Paris, France, by invitation only.

1st Session of the OECD Working Party on Tourism Statistics, 13 June 2017, Paris, France, by invitation only.

OECD High Level meeting on tourism policies for sustainable and inclusive Growth, 2-3 October 2017, Paris, France, by invitation only.

100th Session of the OECD Tourism Committee, 4 October 2017, Paris, France, by invitation only.

15th Global Forum on Tourism Statistics, 2018, data and location to be determined.

To find out more

Contact Mr. Alain Dupeyras, Head of Tourism, OECD, alain.dupeyras@oecd.org

Visit the OECD website www.oecd.org/cfe/tourism

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

OECD Member countries

Australia	Estonia	Ireland	Mexico	Slovenia
Austria	Finland	Israel	Netherlands	Spain
Belgium	France	Italy	New Zealand	Sweden
Canada	Germany	Japan	Norway	Switzerland
Chile	Greece	Korea	Poland	Turkey
Czech Republic	Hungary	Latvia	Portugal	United Kingdom
Denmark	Iceland	Luxembourg	Slovak Republic	United States