



2011-12 PROGRAMME OF WORK OF THE OECD TOURISM COMMITTEE

www.oecd.org/cfe/tourism

This note presents a summary of the 2011-12 Programme of Work of the OECD Tourism Committee. For detailed information about the activities and/or for establishing partnerships with the Tourism Committee, please contact: Mr. Alain Dupeyras (alain.dupeyras@oecd.org; +33 1 45 24 91 45).

MANDATE OF THE TOURISM COMMITTEE 2007-11

The Tourism Committee will assist member countries and, as appropriate, non-member economies to:

- a) Maximise the economic, social and environmental benefits of tourism through medium and long-term strategic development, soundly-developed tourism policy and greater coherence between tourism and other policies (e.g. transport, environment, security, trade, taxation or migration);
- b) Promote, in a globalisation and decentralisation context, sustainable tourism development as a source of economic growth, job creation and poverty alleviation in both major centres and regional areas;
- c) Improve the infrastructure and image of destinations to make them more attractive to the local population and visitors and more competitive to investors for the benefit of the whole economy;
- d) 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, taxation, entrepreneurship and innovation, labour, environment, safety and security, culture, and infrastructure development;
- c) Carry out in-depth tourism industry and market analysis to help member countries, the travel and tourism industry and, as appropriate, non-member economies, realise the overall economic benefit of tourism;
- d) Improve the measurement of tourism services in OECD economies by addressing government and industry information needs and promoting the tourism satellite account, contribute to the dissemination of data on tourism economics and to a more effective use of such data for business and policy analysis and decision-making processes, and work in complementarity with other international organisations;
- e) Provide a forum for dialogue and disseminate results through publications and thematic conferences.

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

- a) 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-member economies in accordance with its Global Relations Strategy, share the results of its work with non-member economies and co-operate closely with other international organisations active in the tourism field.

POLICY ENVIRONMENT

In 2009, the impact of the global financial and economic crisis on travel and tourism has been significant. A rebound took place in 2010. The medium and long-term growth and job creation potential of tourism remains strong but it will require appropriate support from governments. In this environment, OECD countries will need to pursue policy and governance reforms to support the development of a long-term competitive and sustainable tourism growth for the benefits of residents, visitors and businesses. This will be achieved through efficient tourism organisations and with policies and programmes that encourage domestic and international tourism trade, suppress obstacles to tourism development and mobility, improve knowledge management, research and training, support the access of enterprises in the global market and use resources more efficiently and more innovatively to develop and bring to the market products that are competitive in the world market.

Addressing the major challenges faced by the tourism industry and maximising tourism's full economic potential will require an integrated and multi-faceted approach to tourism policy development across many government departments.

In this environment, OECD members see considerable benefit in international co-operation in addressing economic, sustainability and employment issues, tourism policy performance and evaluation, innovation and liberalisation of tourism. A closer co-operation with major emerging economies is also seen as critical to achieve a strong impact with this work.

The OECD is a recognised international player in the tourism field. In many ways, its horizontal approach linking tourism to related policies - such as those aimed at the economy, trade, employment, innovation, transport, green growth and sustainable development, local development and SMEs and Entrepreneurship - is unique. The OECD Tourism Committee can provide policy makers with concrete analysis of key challenges and their economic impacts and policy responses that will shape tourism in the years to come. The OECD guidelines on the economic and social measurement of tourism are internationally acknowledged standards.

EXPECTED OUTCOMES

From its Output Results, the Tourism Committee aims to:

- Support the OECD strategic objectives, notably to promote sustainable economic growth, to provide employment opportunities for all and to promote a sustainable environment;
- Help member countries to tailor their tourism policies to the latest challenges (*e.g.* transition to a green economy), to take a comprehensive approach encompassing the international, national and local dimensions and to look at linkages and coherence with other policies;
- Promote, in line with its Global Relations Strategy, international co-operation between OECD and non OECD countries and other stakeholders on issues related to tourism;
- Promote a culture of evaluation in tourism to increase the capability of national and local governments for measuring the long-term impact of tourism programmes and for improving tourism policy and programme effectiveness;
- Contribute to international tourism development by supporting further liberalisation in tourism and identifying obstacles to international tourism development in the OECD area and beyond;
- Contribute to a better measurement of the importance of tourism services and of their contribution to growth through the development of reliable data and analysis for business and policy decision making;
- Quantify the potential impacts of green innovation in tourism and identify key support policies for maximising the potential of the green innovation in tourism; and
- Contribute to strengthen performance through peer reviews of tourism policies.

PRIORITY 1: EVALUATING AND MEASURING COMPETITIVENESS IN TOURISM

Background and objectives

This activity aims at promoting the culture of evaluation in tourism. Evaluation in tourism will continue to be one of the most significant challenges to strengthen the performance and the impact of tourism policies and programmes in the long term. In 2010, the Tourism Committee is to finalise a framework for the evaluation of tourism policies and programmes, which includes initial research on the evaluation of the overall performance and competitiveness of the country in tourism.

The objectives of this activity will be to deepen the analysis undertaken through a specific project on measurement and evaluation aiming to develop a set of core indicators on tourism competitiveness data and policies and a pilot testing of these indicators with voluntary countries. This new tool should allow the benchmarking of information on competitiveness and performance across countries.

Methodology

The study will identify a set of core/key indicators to be used by governments for measuring the overall performance and competitiveness of a country in tourism. On the basis of existing OECD work and on-going initiatives at national level, a set of core indicators will be developed and analysed using criteria such as policy relevance, measurability, quality or international comparability in order to assess their overall value. Pilot testing will be conducted with voluntary countries, which will be asked to provide information for the indicators available for their country. A consolidated report will be thereafter prepared, which will include methodological elements and national data as well as recommendations for further statistical improvements. The report could be considered as a pilot toolkit for countries to benchmark their performance.

In 2012, the Secretariat will co-organise with the European Commission (Eurostat) and a member country the 11th International Forum on Tourism Statistics, which will associate a broad range of stakeholders from member and non-member economies and from private and academic sectors. The Forum will serve to advance the major technical issues in this area of work.

Expected outcomes

- Promote a culture of evaluation in tourism to increase the capability of national and local governments for measuring the long-term impact of tourism programmes and for improving tourism policy and programme effectiveness; and
- Contribute to a better measurement of the importance of tourism services and of their contribution to growth through the development of reliable data and analysis for business and policy decision making.

Expected output results

- A methodological report on core indicators to be used by governments for measuring the competitiveness of a country in tourism, including pilot country figures.
- An International Forum on Tourism Statistics.

PRIORITY 2: PUBLICATION ON OECD TOURISM TRENDS AND POLICIES

Background and objective

The 2010 edition of *OECD Tourism Trends and Policies* covered the OECD member countries as well as selected non-members (42 countries).

The objective of the publication is to highlight key tourism policy development in member countries and provide a broad overview and interpretation of tourism trends in the OECD area and beyond. This activity also aims to promote a better use of tourism economic data for business and policy analysis.

Methodology

The 2012 edition of the publication *OECD Tourism Trends and Policies* will continue to focus on issues that rank high on the policy agenda in the field of tourism. The first chapter will present a synthesis and review of key aspects of OECD tourism issues and a forward-looking analysis of current tourism policy challenges; a few synthesis tables will provide international comparisons of the main and most recent statistical indicators and trends of the tourism sector. The second chapter will focus on a thematic review to be determined at a later stage by the Tourism Committee. The third chapter will present country policy and statistical profiles, including a self-assessment of best practice policies and programmes for tourism. Particular effort will be made to disseminate the main results and policy messages.

Expected outcomes

- Help member countries to tailor their tourism policies to the latest challenges, to take a comprehensive approach encompassing the international, national and local dimensions and to look at linkages and coherence with other policies; and
- Contribute to a better measurement of the importance of tourism services and of their contribution to growth through the development of reliable data and analysis for business and policy decision making.

Expected output result

- A publication on tourism trends and policies in OECD and selected non-members countries.

PRIORITY 3: GREEN INNOVATION IN TOURISM SERVICES

Background and objectives

The transition towards a greener economy will be a long and challenging process for tourism as for many other sectors. Tourism, as a transversal sector interacting with many other industries and services, can contribute significantly to the shift towards a more sustainable, cleaner and low-carbon economic growth. Entrepreneurs and policy makers are increasingly looking at innovation as a key to improve environmental performance and achieve green growth targets and as a key to improve existing products or to develop more sustainable tourism products and experiences.

The emphasis of the activity will be on green innovation in tourism services. The objectives will be to analyse the role of green innovation in the transition of tourism enterprises (hotels, restaurants, travel agencies, tour operators) to a green economy and how green innovation in tourism is supported (*e.g.* specific structures, mechanisms and good practices) and what could be done to accelerate the diffusion of green innovation in the sector. This activity will contribute to the OECD Green Growth Strategy and support the implementation of the OECD Innovation Strategy.

Methodology

The study will involve the following steps: *i)* a literature review; *ii)* a survey to identify the major innovations contributing to the greening of the tourism economy; *iii)* case studies with tourism enterprises; and *iv)* a report to understand the policies that support the diffusion of green innovation in tourism and their impact.

Expected outcome

- Quantify the potential impacts of green innovation in tourism and identify key support policies for maximising the potential of the green innovation in tourism.

Expected output result

- An analytical report on green innovation in tourism services.

PRIORITY 4: LIBERALISATION IN THE TOURISM SECTOR

Background and objectives

Since more than two decades, the Tourism Committee has undertaken several studies to inventory in a comprehensive and transparent way the measures that impede, restrict or limit international tourism [Inventory of Measures Perceived as Impediments to International Tourism in the OECD Area, DAFE/TOU/WD(96)10/REV1]. Complementary analyses were also undertaken by the Trade Committee [Assessing Barriers to Trade in Tourism Services, TD/TC/WP(2000)10/FINAL]. These reviews have contributed to support liberalisation in the tourism sector and have provided valuable background information for stimulating discussions on the tourism sector in the World Trade Organisation Council for Trade in Services [Tourism Services, S/C/298 and Add.1]. An important achievement in the work of the OECD towards the liberalisation of tourism was the Decision-Recommendation of the Council on International Tourism Policy [C(85)165].

The objectives of this activity are to further support liberalisation in the tourism area and to extend liberalisation measures embarked upon by member countries beyond the OECD area. This activity will focus on a few selected non-member countries (Brazil, China, India, Indonesia, Russia and South Africa) which are close partners with the OECD. These countries are also major tourism players with a rapidly growing trade in tourism services with OECD countries.

Methodology

The study will identify priority areas/measures perceived as obstacles to international tourism and to review current practices for these areas. Priority areas should include measures which constitute a regulatory limitation to the development of international tourism and to the free movement of travellers (covering inbound and outbound tourism flows), for example: tourism businesses regulations, investment or fiscal charges imposed on international travellers and "*raison d'être*". The priority areas will be identified by the Tourism Committee and the review will be done on the basis of a survey carried out in OECD countries and selected non-member countries.

This activity will open a dialogue on these issues with key emerging economies and tourism countries (Brazil, China, India, Indonesia, Russia and South Africa), and will analyse, for the priority areas identified, the measures affecting international travel to and from those countries.

Expected outcome

- Contribute to international tourism development by supporting further liberalisation in tourism and identifying obstacles to international tourism development in the OECD area and beyond.

Expected output results

- A report providing factual information and an assessment of obstacles applying to international travellers, focusing on some priority areas; and
- A dialogue with key emerging economies and tourism countries on OECD liberalisation principles.

PRIORITY 5: COUNTRY/THEMATIC REVIEWS OF TOURISM ISSUES AND POLICIES AT NATIONAL AND LOCAL LEVELS

Background and objectives

Thematic studies and country 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 this activity is to enhance tourism performance and competitiveness, to increase knowledge about tourism policy design and evaluation, diffuse evidence-based lessons and best practices and to strengthen policy coherence at national and local levels.

The country reviews will provide: *i)* a diagnosis of the vitality of the tourism sector at national and local levels; *ii)* an assessment of the strengths of existing national and local tourism policies and challenges for their future development; *iii)* recommendations for future policy improvements.

The thematic reviews will provide an in depth analysis and concrete policy recommendations on specific areas of intervention linking this area with the broader tourism policy framework.

Methodology

The country reviews are prepared by the OECD Secretariat with the assistance of external experts and it closely associates Tourism Committee's delegates (*e.g.* a steering group composed of delegates to the Tourism Committee). The reviews build on a common analytical, but flexible, framework to evaluate tourism policies. The country reviews are based on five main phases:

- Preparatory phase: including the definition of an outline for the review followed by data gathering (fact-finding questionnaire);
- Consultation phase: including a fact-finding mission;
- Drafting phase;
- Assessment phase: including the discussion of the review report and findings and a peer review process with the Tourism Committee; and
- Communication phase: including a report or a publication and a high level seminar (to be organised with the support of the country under review) to disseminate the results and the recommendations to a wider audience.

The thematic reviews focus on specific programmes of action and are prepared by the OECD Secretariat and external experts. The thematic reviews include a preparatory phase (definition of an outline); a drafting phase and the identification of concrete recommendations. The reviews will contribute to analyse linkages between tourism and other economic activities (*e.g.* agriculture, energy, transport or construction). A thematic review focusing on food culture, attractiveness and tourism is proposed for early 2011.

Expected outcome

- Contribute to strengthen performance through peer reviews of tourism policies.

Expected output results

- Two country reviews; and
- Two thematic reviews.