



**OECD GLOBAL FORUM ON TOURISM STATISTICS,
KNOWLEDGE AND POLICIES**

***Reshaping tourism for a more resilient
and sustainable tomorrow***

3-5 November 2021

Highlights

Table of contents

Global Forum on Tourism Statistics, Knowledge and Policies	3
High level overview and key messages	3
Opening session	7
Session 1: Lessons from the crisis? Better preparing tourism for a more resilient future	8
Session 2: Recovery and beyond: building tourism back better	13
Session 3: Towards a new future for tourism	18
Closing session	23
Annex A. Results of participant polls	24

Figures

Figure 1. What is the most important challenge for the resilience of the tourism sector?	24
Figure 2. What is the main data priority to support the tourism recovery?	24
Figure 3. Do you think the crisis has created momentum to improve the measurement of tourism?	25
Figure 4. Who will be the most important actors in making the tourism ecosystem more sustainable?	25
Figure 5. Do you agree we are on track to build a greener, more sustainable tourism economy?	26
Figure 6. What do you think is the biggest challenge in using new sources of data for tourism?	26

Boxes

Box 1. Collaborative approaches and structures to strengthen recovery and resilience	10
Box 2. Tourism data initiatives during COVID-19	12
Box 3. An integrated approach to sustainable tourism in Norway	14
Box 4. Sustainable tourism strategy and <i>Swiss-tainable</i> programme, Switzerland	17
Box 5. Using new data sources to improve timeliness and granularity of tourism data	19
Box 6. Key initiatives in pursuing recovery and a sustainable future for tourism	22

Global Forum on Tourism Statistics, Knowledge and Policies

High level overview and key messages

The OECD Global Forum on Tourism Statistics, Knowledge and Policies was hosted by the Ministry of Culture, Sports and Tourism of the Republic of Korea in Seoul on 3-5 November 2021. It brought together senior policy makers, statisticians, and leaders from the private sector and civil society to exchange ideas, views, and experience under the theme ***Reshaping tourism for a more resilient and sustainable tomorrow***.

The Global Forum provided a unique platform to support tourism recovery and develop a common transformation agenda for the tourism economy, to move to stronger, more sustainable, and inclusive models of tourism development in the future. Discussions were structured around three sessions, each involving two panels:

- **Session 1: Lessons from the crisis? Better preparing tourism for a more resilient future:** This session took a close look at the experience of the COVID-19 pandemic and lessons for the tourism sector that can be learnt from it. Panel 1a focussed on building resilience, with Panel 1b looking at data innovations and experiences to take from the crisis.
- **Session 2: Recovery and beyond: Building tourism back better:** This session focussed on how a new, more inclusive and sustainable tourism economy can be developed from and after the recovery. Panel 2a considered social and economic aspects, driving the recovery to support people, businesses and places. The Panel 2b considered environmental issues and building a greener tourism economy.
- **Session 3: Towards a new future for tourism:** This session addressed the agenda and policy directions for a new future for tourism. Panel 3a considered how policies can be better informed by improved data and evidence. This was followed by a high-level panel of tourism policy makers who exchanged views on the outlook for the recovery and their vision for the future.

The Global Forum was well supported and involved presentations from more than 40 speakers, including at the ministerial level. The event was held in hybrid format, and attracted over 900 participants from more than 70 countries. The event coincided with the 25th anniversary of Korea's accession to the OECD.

Context¹

The COVID-19 pandemic continues to have widespread consequences for people, businesses, economies and societies. As an activity that is inherently dependent on the movement and interaction of people, tourism continues to be one of the sectors hardest hit, and this is having a knock-on impact on the wider

¹ Further information is provided in the [Issues Paper on Reshaping tourism for a more resilient and sustainable tomorrow](#), prepared to support the Global Forum.

economy. Meanwhile, the world faces profound economic, environmental and social challenges, including the accelerating climate, nature and pollution crises and rapid technological change.

The pandemic is a call for governments at all levels to take proactive steps and co-ordinated policy action to mitigate the impacts and support a rapid recovery of the tourism economy, build more resilient, greener and inclusive tourism destinations, and prepare the sector more broadly to respond to future shocks. The pandemic has further strengthened the need for more timely, comparable and granular data to support policy making. Addressing this will require a strategic vision, with well-articulated objectives, and an integrated approach bringing together key stakeholders, locally, nationally and internationally.

In 2019, international tourist arrivals stood at around 1.5 billion globally. By the beginning of 2021, they had declined by 88% compared with pre-pandemic levels². Since then there has been some recovery, but this remains fragile and uneven amid much uncertainty. The direct economic impact of this decline in travel and tourism is far reaching, with further significant indirect effects owing to linkages to upstream sectors. Overall, it is estimated that global economic losses could range between USD 1.7 and 2.4 trillion in 2021³. According to a recent survey of OECD countries, the sector is expected to rebound in 2022, but recovery may take as long as four to five years⁴.

Many activities have affected the short and longer term impact of the pandemic on tourism, including the roll out of vaccination, the removal of travel restrictions, the building of traveller confidence, a shift in travel patterns, including to more domestic tourism, and the provision of financial support to the sector by governments. More consideration is needed of the implications of this for the future of tourism and its resilience and for approaches to further crises that may occur, taking account of the lessons learned from COVID-19.

The hiatus in travel and tourism has provided an opportunity to rethink policy towards the sector and address the challenges faced by it, which were already apparent before the pandemic. These include tackling the consequences for and of climate change and the depletion of natural capital, fully grasping the opportunities presented by ongoing digital advances, and delivering more equitable and inclusive benefits to everyone engaged in and affected by the sector.

These issues are globally relevant, requiring coordinated policies and actions. Sharing of knowledge, experience and understanding between countries and international bodies can assist greatly in this. Common tools are needed, including improved data and statistics which are better designed to track the performance of travel and tourism in its path to recovery, keep abreast of trends and measure impacts and outcomes related to the new and future challenges faced by the sector.

Key messages emerging from the discussions

The Global Forum covered a considerable amount of ground with a wide range of experiences and observations presented by speakers. The most frequent and significant points arising can be summarised as follows, in no particular order (see indicated panels for further information):

Current context and shaping the transition from the recovery to the future

- **Recovery is still weak**, requiring a continued focus on creating the conditions for safe and seamless travel to be maintained and for necessary support to be provided for fragile and indebted tourism businesses (*panel 1a and high level panel*).

² UNWTO World Tourism Barometer, September 2021

³ COVID-19 and Tourism, an update – Assessing the economic consequences, UNCTAD, 2021

⁴ OECD Survey on supporting recovery and building a more resilient tourism economy, October 2021

- **Frequent risk assessment is necessary** to strengthen resilience and response in uncertain times (*panels 1a and high level panel*).
- **Climate change and environmental impacts are fundamental issues and require a stronger response**, to address both adaptation and mitigation, and to pursue and invest in new technologies and approaches to reduce emissions and other impacts (*panels 2b and 3a*).
- **Tourism plans and strategies should move beyond pursuing visitor volume and total spend to consider the net value of tourism**. This involves better balancing and distributing the full costs and benefits to local communities and regions (*panels 2a and 3a*).

Conditions and approaches to support the transition

- **Trust and collaboration between government, industry and civil society are essential to tackle resilience and sustainability challenges**. This can build on the legacy of collaboration during the pandemic (*panels 1a, 2b and 3b*).
- **Many resilience and sustainability issues are best tackled at the level of local destinations**. This requires the strengthening of destination management organisations and local governance structures, and giving a strong voice to local communities (*panels 2b and high level panel*).
- **The power of the market can be harnessed to drive change**. This implies giving greater attention to consumers, and providing tourists with the right information, including on sustainability issues, to inform decisions and send commercial signals to the industry (*panels 2a, 2b and 3a*).
- **Tourism businesses of all sizes need to be encouraged and assisted to adapt to the sustainability agenda**. Measures include guidance, standards, certification, financial incentives and other supports as appropriate (*panel 2b*).

Opportunities and challenges

- **Diversification of products and markets should be considered in tourism strategies**, to meet structural and behavioural changes in demand, and to underpin resilience through spreading risk (*panel 2a and 2b*).
- **Opportunities from digitalisation must be seized and made more universally accessible**. Digitalisation is relevant to all aspects of tourism development and management, including in communications, enhancing visitor experiences, and increasing economic, social and environmental sustainability (*panel 2a and high level panel*).
- **Labour and skills shortages are a major inhibitor for tourism recovery**. This presents a considerable challenge to economic and social sustainability and resilience, requiring attention from government and industry (*panel 1a, 2a and high level panel*).

Data needs and approaches

- **Initiatives to develop more timely and granular tourism data during the pandemic should be reviewed and continued**. This goes together with the further adaptation of existing data streams and the scrutiny of new sources to meet the identified needs of a new policy agenda (*panel 1b and 3a*).
- **Users and producers of tourism data need to coordinate to develop new data sources and applications**. This will reduce overlap, improve cost effectiveness, and increase accessibility and transparency (*panels 1b and 3a*).
- **Development of practical, comparable and agreed tourism sustainability indicators requires more attention**. This includes the sourcing and application of data to monitor against these indicators (*panels 2b and 3a*).

Government support to deliver

- **Greater recognition by government of the economic and social importance of tourism** is essential, if the sector is to secure the required support, funding and investment for sustainable development and management (*panels 2b and high level panel*).
- **Countries need to continue to closely work together** to coordinate their policies and to share data, knowledge and experience to establish a more resilient and sustainable tourism sector, including through international organisations. This cannot be achieved in isolation (*panels 1a, 3a and high level panel*).

Opening session

In his opening remarks, **Mr. Hee Hwang, Minister of Culture, Sports and Tourism, Republic of Korea underlined the power of solidarity and collaboration, which has been learnt during the COVID-19 pandemic, and stressed that now is the time to step it up.** This Global Forum provides an opportunity to prepare together a vision for the future of tourism with strong cultural diversity and inclusiveness. Speaking of his pleasure in hosting this important event in Seoul, Minister Hwang expressed Korea's commitment to build on its history of cooperation with the OECD in the field of tourism to work in the following three directions:

- Sharing experiences of the tourism industry's response to the pandemic, to support a viable recovery plan for similar future crises.
- Actively supporting the digital transition of the industry and utilising digital technology.
- Through cooperation with OECD Members, supporting the structural changes necessary to establish a more resilient tourism economy.

In concluding, the Minister noted that the tourism sector is now at a critical point. This Global Forum will help the transition into a new future, with the discussions creating a strong foundation to grow together.

Mr. Mathias Cormann, OECD Secretary-General spoke of the importance of tourism to the global economy and the significant challenges that it has faced from the pandemic, and underlined that measures must be put in place now to shape a more resilient, sustainable and inclusive tourism economy. Countries with the largest travel and tourism economies experienced the largest fall in national GDP in 2020 when the pandemic hit. Economic growth is picking up but recovery remains uneven across countries and sectors, and in particular for the tourism sector.

The Secretary-General focused on three priority areas of action:

- Restoring safe and seamless international mobility, through internationally coordinated approaches to COVID-19.
- Accelerating the transition to a greener tourism economy, translating commitments into real action and outcomes, with environmental objectives embedded into tourism policies and the use of comparable indicators.
- Taking advantage of the opportunities provided by new digital tools as a result of digital transformation, with increasing access and use by small tourism businesses.

Across all these areas, timely, granular and comparable data is critical. The OECD is proud to play a leading role on these issues, through the Tourism Committee and its Working Party on Tourism Statistics.

The Secretary General concluded by reminding participants that together we have the power to turn this crisis into an opportunity to make the tourism sector a driver and a pillar of a long lasting, sustainable and inclusive recovery. The OECD stands ready to work with all concerned to harness the brilliant ideas, knowledge and enthusiasm of the tourism community to make this a reality.

Session 1: Lessons from the crisis? Better preparing tourism for a more resilient future

High level scene-setting interventions

- **Ms. Maria Ximena Lombana, Minister for Commerce, Industry and Tourism, Colombia** spoke about measures taken to mitigate the impact of the COVID-19 pandemic on tourism, and highlighted that Colombia's long term sustainable tourism strategy still prevails. Mitigation measures included a new General Law of Tourism in 2020 with short, medium and long term measures, including support for investment. While this is aimed at reactivating the sector, Colombia had for many years recognised the opportunity as well as the responsibility to promote sustainable tourism. It had formulated a sustainable tourism policy 'Together with Nature', as a long term strategy which seeks to unite stakeholders towards sustainable tourism goals and is in line with Agenda 2030. Implementation involves training and support for entrepreneurs, including an e-learning platform, a good practice manual and workshops.
- **Ms. Ghada Shalaby, Vice Minister for Tourism, Ministry of Tourism and Antiquities, Arab Republic of Egypt** reflected on lessons from the handling of COVID-19 in Egypt, and the need to address the sustainable development needs of individual destinations. The need for financial support for private sector tourism businesses was apparent from the outset. In this, priority was given to support for staff, both financial and also in terms of health, safety and welfare, including vaccination and provision of staff protection manuals. Support for businesses has been linked to staff retention and training programmes have helped the sector to recover. Regulations and communication proved vital for the health and safety of travellers and in the eventual opening up of the country.

Panel 1a: Building tourism resilience

Moderator

- Mr. Sergio Guerreiro, Tourism Committee Chair, and Senior Director, Turismo de Portugal

Panellists

- Mr. Victor Tharage, Director General, Department of Tourism, South Africa
- Ms. Jennifer Cronin, President, Wharf Hotels
- Ms. Maria Teresa Solís Trejo, Industry Expert – Tourism and Regional Development, Deloitte, and former Undersecretary for Tourism, Mexico
- Mr. Graham Harper, Special Advisor – Sustainability and Corporate Social Responsibility, PATA
- Mr. John Hart, Entrepreneur and Executive Chair of Australian Chamber – Tourism
- Mr. Stefan Hartman, Managing Director, European Tourism Futures Institute

The COVID-19 pandemic revealed the vulnerability of the tourism sector and the lack of preparedness and capacity to respond to major crises. This session focussed on learning lessons to take forward from the experience. The panel discussed the responses and actions taken in different countries and how changes can be made to make the sector more resilient in the future:

Tourism businesses and staff have required a support lifeline. The panellists described the evolving story of the pandemic and its consequences in a variety of countries. The severity of the impact on tourism business became clearer once the length of the crisis became more apparent and has been felt in all parts

of the world, pointing to the need to have a forward-looking perspective, informed by timely data and forecasting on the progress of the crisis itself and on its economic and social impact. Cashflow continues to be an issue for tourism businesses in many countries, as they look to recover their losses. Panellists described the necessary measures taken to support small tourism businesses and, most particularly, the wellbeing of employees, through the use of furlough schemes and other support, as in the example of Egypt given in the scene setting intervention.

Collaboration and effective governance is key. *A poll of Global Forum participants found that governance is considered to be one of the most important challenges for the resilience of the tourism sector, requiring government and the private sector to work closely together* Figure 1, Annex A). A key message from the panel was the importance of collaboration which is based on trust. To be successful, actions to support the tourism sector required collaboration within government (between ministries responsible for tourism, health and other functions affecting tourism) and, critically, between the public and private sectors. Examples of collaborative approaches provided by panellists are outlined in Box 1.

Resilience may need to be built at a local destination level. Experiences and response models discussed during the session highlighted that the necessary action to cope with a crisis and to avoid or withstand future threats often needs to be taken at a local level, within the context of destination management and stewardship. However, the ability to do this varies considerably from place to place. PATA is working to address this issue through its [Tourism Destination Resilience Project](#), which combines risk assessment, risk management and adaptive capacity building. PATA note that such an approach could be rolled out and coordinated through linking national and local policies and actions.

Planning for crisis management and resilience should be kept current and alive. The pandemic has demonstrated the need for vigilance and a dynamic approach to crises, which are unpredictable and may occur at any time. The panel concluded that risk assessment and crisis management guidance should be constantly refreshed. Panellists applauded the Wharf Hotels example of a regularly updated risk register and a ‘living manual’, as too often crisis management plans are simply put on the shelf and forgotten.

Perceptions and accurate communication are critical for recovery and resilience. While governments and industry are major players in a crisis, the experiences described during the session showed that much also depends on the behaviour of tourists in determining the level of impact and the pattern of recovery. This can be influenced by perceptions, as well as by the reality, of health, safety and security conditions. For example, the lack of travel restrictions in some countries gave international travellers the perception of a potential lack of safety, which needed to be addressed alongside the promotion of safety protocols amongst the private sector. The panel discussion identified the importance of consistency of communication – messengers may be different but messages should be the same.

Labour shortages are seen as a major inhibitor of recovery. Disruption caused by COVID-19 as well as other economic factors have led to a loss of staff and problems in recruiting, affected by issues such as job insecurity, safety, salary levels, career prospects and competition from other sectors. One panellist referred to this as the greatest labour force disruption of our time and spoke of a war for talent retention and recruitment. Panellists concluded that this situation requires a response from industry and government.

Market changes and diversification can affect recovery and future resilience. During the session evidence was presented of possible structural changes in market demand, caused in part by behavioural changes resulting from the pandemic but also by other influences. A market survey by Deloitte in 2021, for example, pointed to an ongoing, and possibly increased, desire to travel for leisure purposes which could fuel a full recovery, but a less certain corporate travel market, affected by new ways of working but also by a need to reduce costs and carbon emissions. These new influences and goals have implications for structural change away from business as usual, and need to be understood in helping destinations to be more resilient. The need for diversification of the economy as a whole and of tourism products and markets, as a general principle behind strengthening resilience, was a recurring theme in the panel presentations and discussion.

Resilience and sustainability are interrelated. A number of panellists commented that a destination cannot be sustainable if it is not first resilient. Equally, meeting the requirements of sustainability was seen as an increasing prerequisite for resilience. *A poll of Goba Forum participants identified 'increasing tourism sustainability' as the most important challenge for the resilience of the tourism sector* (Figure 1, Annex A). This indicates that sustainability and resilience should be linked as mutually dependent aims of tourism policy. Many countries have already committed to tourism policies that are driven by sustainability principles. A necessary component of these policies is agility and adaptive capacity building, to reflect changing circumstances and the needs of recovery and resilience. An example is the relationship between the recent law to support reactivation of tourism in Colombia and the country's long term sustainable tourism strategy, as described in the scene setting intervention.

Countries should work together at a regional and global level. The need for collaboration based on trust was strongly underlined by panellists and applies within and between countries. In South Africa, for example, the close working relationship between government and industry from early in the pandemic (Box 1) provided a basis for collaboration with neighbouring countries on data, health measures and the harmonisation of standards. This process had been helped by a meeting of the UNWTO Regional Commission. It was felt that this kind of coordination within regions is helpful, within the context of a global approach articulated and supported by international organisations.

Box 1. Collaborative approaches and structures to strengthen recovery and resilience

South Africa: The Department of Tourism brought key bodies together at the outset of the pandemic to consider various scenarios. This included the Tourism Council of South Africa, various industry sub-sectors, labour representatives and communities. By doing so, they were able to react swiftly as the course of the pandemic unfolded and to design the necessary support measures for approval by Cabinet. Meetings were held daily in order to reach a common position. This collaboration also helped to provide confidence within the industry during the phase of reopening.

Australia: Earlier crises such as the bush fires leading into the start of COVID-19 had created an unprecedented partnership for resilience between government and industry, bound together by a trust relationship not seen before. This led to the provision of support from government and collaboration between the various industry players. The Australian Chamber of Tourism subsequently formed a [Restart Tourism Taskforce](#), involving heads of all the sectors, as an industry group that government could tap into to clarify industry positions to enable it to make faster policy decisions.

Hong Kong, China: Leading hotel brands came together to create a joint programme of information and public facing marketing to support recovery. The group is also represented in policy discussions.

Panel 1b: Data innovations and experiences to take from the crisis

Moderator:

- Mr. Christophe Demunter, Head of Tourism Statistics, Eurostat

Panellists:

- Mr. Ossi Nurmi, Senior Statistician, Statistics Finland
- Ms. Andrée Desjardins, Chair of OECD Working Party on Tourism Statistics, and Director, Tourism and Transportation Statistics, Statistics Canada
- Mr. Rod Batty, Manager, Tourism Research Australia
- Mr. Filipe Batista e Silva, Joint Research Centre, European Commission
- Mr. Nicolaes Heerschap, Programme Manager, Statistics Netherlands

The previous panel on recovery and resilience regularly pointed to the importance of timely data to guide policy, decision making and actions during the COVID-19 pandemic and beyond. The purpose of this panel was to consider experiences and examples of innovation and good practice in data gathering, analysis and use which emerged during the crisis, and to identify key issues and lessons arising from them:

The pandemic has created momentum for innovation and change in tourism data and reporting. All the panellists described how the crisis had, of necessity, stimulated new thinking and approaches to tourism data. Sometimes it had brought forward ideas and plans that had been considered or formulated prior to the pandemic. There is some uncertainty, however, about how easily data improvements can be made and maintained. *A poll of Global Forum participants found clear recognition of a new momentum, but equally some doubts about the availability of sources, resources and capacity to deliver this* (Figure 3, Annex A). Panellists described various new initiatives taken during the pandemic, some examples of which are given in Box 2.

There is a clear need for data that is timely but also granular. Panellists confirmed that the uncertain and fast-changing situation encountered during the pandemic required the maintenance of an up-to-date picture of tourism performance, even if this might be at the expense of high levels of accuracy. However, *a poll of Global Forum participants showed that granularity was considered almost equal to timeliness as a priority for data in supporting the tourism recovery* (Figure 2, Annex A). This relates to a recognition of the varying situation in different types of destination which was apparent during the Global Forum discussions.

Existing data may be used in new ways to address changing needs. The panellists emphasised that it had not always been necessary to turn to new sources of data. In Finland, Canada and Australia, new ways of using traditional data have been used as part of the approach.

Many new data sources exist but their application requires careful scrutiny. Even prior to the pandemic, the advent of big data, notably from commercial companies, has created a ready source of data on tourist movements, spending and response that is often both timely and granular. The panellists presented initiatives showing how this could be effectively used. However, the discussion also revealed concerns about some forms of new data which are expensive and have limited utility.

There are positive examples and opportunities for combining old and new sources of data. A key conclusion from the discussion, supported by the examples presented, was that much could be achieved by combining different sources of data, old and new. In Canada, and elsewhere, the use of change indices, rather than absolute values has made combining sources more possible. However, it is important to be clear about what is being measured, and to undertake the required combining and re-calibration with the

necessary expertise. A further reason for using multiple data sources, underlined by panellists, is to mitigate the possible loss of any one source. It was felt that some sources may become unavailable or unreliable over time for technological, contractual, financial or other reasons.

Data platforms can be used to inform on new tourism management priorities. Experience from the pandemic shared by panellists showed how data platforms can be used to not only track tourism performance, but also to provide wider information to assist with tourism management. This can include topics relating to tourism impact or management response, as in the example from the EU on resilience and sustainability conditions in different countries, referred to in Box 2.

Ongoing support from users is needed to maintain the flow of valuable new data in the long term. A key issue raised during the discussion was the ability to maintain new data approaches and initiatives into the future. Some panellists commented that willingness by businesses to provide data may reduce after the pandemic, while there was an equal feeling that the industry and government would now expect the delivery of timely performance data to continue and possibly be widened to embrace other issues. A particular concern raised by panellists is the availability of funding to meet the costs of new data. The importance of ensuring that new data meets the requirements of, and is fully valued by, users and ongoing funders, was emphasised. Panellists felt that a holistic approach is needed, based on better collaboration between data users, suppliers and other stakeholders.

Box 2. Tourism data initiatives during COVID-19

Finland: A new statistical product was established during the pandemic. This is a scenario model, involving ‘nowcasting’ and forecasting of tourism demand, built on combined inputs from the Tourism Satellite Account, short-term tourism statistics and expert views on the recovery. It shows ‘what if’ scenarios for 2020-22 (business-as-usual, optimistic, pessimistic). Estimates are updated regularly and used to plan recovery measures.

Canada: The Canadian Tourism Activity Tracker was developed as a data visualization tool, integrating multiple data sources into a simple visual indicator of the state of recovery of tourism in Canada. It has three dimensions: domestic, inbound and combined. The tool provides a Tourism Recovery Index. It was put together following a hack-a-thon involving data scientists, economists and tourism professionals. Data can be easily added or substituted in the tracker, and its use can be expanded to include new concepts. The timely results show monthly changes in the level of tourism related activity.

Australia: Faced with the need to provide more timely data on tourism performance, a fresh look was taken at traditional data sources and surveys which were re-worked to maximise their usefulness. New data was also brought on board, including data from mobile network operators, GPS, GDS bookings and accommodation and business data. This enabled monthly (previously quarterly) reporting.

European Union: New data-fuelled web platforms have been introduced to inform decisions during and post COVID-19. The [Re-open EU platform](#) provides information to citizens on travel restrictions and other measures in EU Member States. The forthcoming EU Tourism Dashboard contains 25 country-level indicators covering tourism resilience, environmental impact and digitalisation.

Session 2: Recovery and beyond: building tourism back better

High level scene-setting intervention

- **Mr. Gustavo Segura, Minister of Tourism, Costa Rica spoke of the recent history of tourism in Costa Rica, which had been guided by a strong policy based on sustainability, and the role this is playing in the recovery.** Over one quarter of Costa Rica is subject to nature protection, while the tourism industry is seen as a vital driver of social progress. The country is following a model of moderate growth at 4% per annum. Recovery from the pandemic in recent months has been strong, partly as a result of the positive positioning of Costa Rica as a destination based on sustainable nature, as well as clear messaging and cooperation between government and industry. Sustainability is becoming a strong factor in traveller decisions. During the pandemic the brand position has been modified from an essentially nature-based proposition to a more holistic projection of wellbeing – as ‘Life’s essentials found here’, promoting the opportunity to ‘balance, connect and recharge’.

Panel 2a: Driving the recovery to support people, businesses and places

Moderator:

- Ms. Jane Stacey, Head of Tourism, OECD Centre for Entrepreneurship, SMEs, Regions and Cities

Panellists:

- Ms. Ingunn Sørnes, Special Advisor, Innovation Norway
- Ms. Susanne Kraus Winkler, Entrepreneur and President, Austrian Chamber of Commerce – Professional Hotel Association
- Mr. Jeremy Sampson, CEO The Travel Foundation and Chair at Future of Tourism Coalition
- Mr. Gabriel Petrus, Deputy Director for Partnerships, International Chamber of Commerce
- Mr. Subeom Lee, Portfolio Manager for New Business, Incubation Center, LG Electronics
- Ms. Hermione Joye, Head of Travel APAC, Google

The panel focussed on the economic and social dimensions of sustainability and how the shape of the recovery from the pandemic can influence the livelihoods of people, including visitors, business operators, employees and communities. Topics for discussion included, amongst others, how to meet the needs of business while promoting more inclusive approaches and how to use new opportunities from digitalisation for the benefit of all.

Aims and targets should be clearly defined. While the concept of ‘building back better’ was fully endorsed by the panel, there was a strong plea to clarify what is meant by ‘better’. This is too often expressed simply as a platitude.

New approaches should address pre-pandemic challenges alongside the recovery. Panellists raised a range of challenges for the sector which were apparent before the pandemic and which should be addressed in future approaches. Economic and social factors included seasonality of demand, economic leakages, overcrowding and overconsumption, exclusion and inequity, overdependence on tourism, poor remuneration and career prospects and low financial margins. At the same time, it was recognised that these issues and impacts vary considerably between destinations.

A greater awareness of tourism's net value is needed. Much of the discussion related to issues of tourism volume and value. It was noted that there has been a general re-focussing of targets away from volume and towards levels of tourism spending. While this may be welcome, it was pointed out that the latter does not necessarily equate to high value, taking into account issues of leakage, distribution, resilience and inclusiveness, as well as the associated costs incurred on public services, communities and the environment. Rather, it was proposed that destinations should turn their attention to measuring and targeting net value from tourism. This could be facilitated by the identification of relevant indicators.

This requires a holistic approach to tourism, addressing the aspirations of businesses, visitors, communities and the environment. A theme emerging from the panel discussion was the need to take a holistic approach to future tourism development and management. Panellists pointed to the opportunities to address areas of mutual benefit for different groups of stakeholders, including business, visitors and local residents. This approach has been well illustrated in Norway, for example (Box 3).

Governance and management structures should embrace stakeholder interests. *A poll asked Global Forum participants to identify who will be most important actors in making the tourism ecosystem more sustainable: Over half of respondents believed that this fell to governments, with small proportions voting equally for consumers (tourists), the private sector (businesses) and civil society (communities) (Figure 4, Annex A).* While the panellists recognised the key role of government, in response to the poll results they also placed much emphasis on the need for more engagement of other stakeholder groups. In particular, there was a call for local communities to be given a louder voice in destination management. This holistic approach was considered to be most easily delivered at a local level, with the panel underlining the importance of local multi-stakeholder destination management organisations, which will play a key role in delivering the strategy in Norway, and a programme for sustainable recovery in Austria.

Consumers (tourists) have an increasingly important influence on sustainability. Many of the panellists pointed to a stronger interest and awareness of sustainability issues amongst the travelling public, partly as a result of the COVID-19 pandemic. They recognised the market as an increasingly powerful driver of change. This creates a new incentive for businesses to pursue inclusive and sustainable tourism as a commercial opportunity rather than viewing it just as a cost or an obligation. The implications for marketing messages to make the most of this awareness, as modified by reactions to the pandemic, was illustrated by the example of Costa Rica in the scene setting intervention. The importance of building new tools to tell travellers about efforts taken to address sustainability, to help them make better informed decisions, was also stressed by panellists.

Box 3. An integrated approach to sustainable tourism in Norway

In Norway the tourism sector faced a number of challenges prior to COVID-19. These included strong peaking of demand, seasonality of revenue, areas of both under and over-tourism, pressures on vulnerable nature and low profitability in the industry. Faced with this, Innovation Norway developed a [National Tourism Strategy 2030](#) focussed on the management of sustainable destinations. A holistic perspective has been applied, which seeks to benefit companies, guests and local communities.

Mutually dependent goals have been set. These include: value creation (profitability and jobs); ripple effects (local value chain linkages); guest satisfaction (for priority target groups); attractive local communities and happy residents; and the climate footprint. The strategy to deliver on these goals requires the reinforcing of five capabilities, covering: framework conditions and adaptation; restructuring; management; value creation; and the ability to interact. A focus is placed on action at the local destination level.

Digital transition is a key enabler of inclusive and sustainable tourism. A number of panellists provided examples of how the application of digital solutions had played a major role in stimulating and linking the demand and supply side of sustainable tourism. Three main areas of activity were discussed:

- The opportunity to influence a major new market of young travellers, especially in Asia and the Pacific, who are ‘digital-only’ and will respond to innovative applications. For example, Google has built various digital tools to meet the needs of sustainability conscious travellers affected by the pandemic, including ‘free cancellation’ filters, vaccination wallets, real time travel data and sustainability information.
- The creation of alternative visitor experiences through innovative use of digital technologies (e.g. virtual reality), which may add value by enhancing visitor management, access and understanding.
- The need to widen access to digital skills and technology amongst tourism SMEs, to improve their performance and sustainability and to enhance inclusiveness in the sector.

Challenges resulting from COVID-19 will continue to dominate the business environment. While agreeing on the need and potential to build a more sustainable and inclusive tourism economy, panellists also underlined the major ongoing challenges faced by businesses as a result of the pandemic. Business survival was seen as an essential requirement of sustainable tourism. There was a call for a more consistent and coordinated approach to enabling safe and seamless travel, including digital systems for cross-border checking and increased worldwide vaccination. Business indebtedness remains a major issue and labour shortages were identified as a significant constraint to recovery, echoing the findings from Session 1. In Austria, for example, these challenges are being met by a new government initiative to modernise the tourism labour market, strengthen equity and financing for tourism companies, and provide funding for regional co-operation and for international and domestic marketing.

Government support and investment is needed to implement action for change. At the end of the session, panellists were asked whether they were optimistic about achieving the transformation that had been discussed. In the main their answers were positive. However, they underlined that this will require a shared sense of responsibility between all concerned, including the engagement of governments and major industry players. They also emphasised the need for implementation as well as communication. Furthermore, they recognised that many solutions will be costly and require new levels of investment which will need to be supported by government.

Panel 2b: Building a greener, more sustainable tourism economy

Moderator:

- Ms. Céline Kauffmann, Head of Entrepreneurship, SMEs and Tourism Division, OECD Centre for Entrepreneurship, SMEs, Regions and Cities

Panellists:

- Mr. Simon Upton, High Parliamentary Commissioner for the Environment, New Zealand
- Dr. Megan Morikawa, Global Director of Sustainability, Iberostar, and Chair of WEF Global Future Council on Sustainable Tourism
- Mr. Wilbert Víctor Ataco Zúñiga, Deputy Manager Environmental Management, Machu Picchu District Municipality, Peru
- Mr. Richard Kampf, Head of Tourism Affairs, State Secretariat for Economic Affairs, Switzerland
- Ms Helena Rey de Assis, Programme Officer Consumption and Production Unit, UN Environment

The panel focussed on environmental sustainability and the green transition. The context is dominated by major global challenges, identified by the UN as the triple planetary crisis, which includes nature/biodiversity, pollution and waste, and climate change. These issues need to be seen within the overall context of sustainability, with a strong connection to the topics and approaches discussed in the previous panel.

A major policy shift is needed towards a new tourism model. A strong message repeated in the interventions was the need for significant change in the face of environmental imperatives. Panellists referred to the need to identify a new vision and future model for tourism and to show leadership, recognising that the disruption caused by COVID-19 has created the right conditions for this. They also emphasised that change should not be pursued by tourism in isolation but as part of a programme for the entire economy, delivering on international commitments on the environment and requiring strong inter-sectoral coordination.

New commitments and action are evident, but should be stepped up. Panellists referred to much greater recognition of climate change and environmental impacts within national and international policies for tourism. Indicative of this was the launch on the same day of the [Glasgow Declaration: a Commitment to a Decade of Tourism Climate Action](#), as part of COP26, through which signatories commit to plans to cut tourism emissions in half over the next decade and reach net zero emissions before 2050. However, commitments require action. *A poll of participants in the Global Forum revealed that a small majority felt that the world is on track, although not strongly so, to build a greener tourism economy, but almost forty percent believed that this was not the case* (Figure 5, Annex A). Panellists concurred that action needed to be stepped up.

Tourism has a complex relationship with the environment, requiring adaptation to be addressed alongside mitigation. The interventions highlighted the special position of tourism as a sector which itself is heavily dependent on the quality of the environment. This provides further reason why negative environmental impacts from tourism should be reduced, but also why adaptation of the sector to climate and other changes is highly important. Panellists emphasised the need to integrate mitigation and adaptation policies and actions.

Some tourism businesses are showing leadership in environmental management but this should be broadened. The panel was informed about the positive response of some leading tourism businesses, influenced not only by corporate responsibility but also by changing costs, efficiency requirements, market factors and legislation. This should lead the way for others to follow, assisted by guidance and support. The example of the hotel group Iberostar was presented, whose [Wave of Change](#) movement includes targets and action on plastics, waste to landfill, carbon neutrality, seafood, local ecosystems, customer response and inspiration to other businesses.

Collaborative public-private action is needed at a local level, together with investment in relevant infrastructure. Panellists underlined the need for tourism businesses to work together and with local authorities and other stakeholders on environmental management. It was pointed out that public sector engagement and investment is needed in services such as water, waste management and renewable energy, as well as in providing strategic direction and guidance. This can be best achieved through planning and coordination at the local destination level, within a national framework, as in the approach presented by Switzerland (Box 4).

Sustainability standards and indicators are needed to identify and guide good practice. There was a call for more widespread use of agreed sustainability standards and indicators to inform and guide businesses, consumers and destinations, and also to guard against greenwashing. Reference was made to the use of certification schemes in line with the Global Sustainable Tourism Criteria. The example of Machu Picchu showed how certification and labelling is relevant to destinations as well as to businesses. At the destination level, Machu Picchu seeks to drastically reduce CO₂ emissions with the intention of

reducing 45% of CO₂ emissions in 2030 and reaching neutrality in 2050. Through biofuels and sustainable waste management with support of the local community, circular economy practices have advanced.

Funding and fiscal measures should be more focused on delivering sustainability. Panellists indicated that the significant level of change required in the sector to achieve climate targets and other objectives will require substantial amounts of funding, including from governments. This should include direct investment as well as the use of financial instruments and incentives. There was a call for outdated subsidies, which may act against sustainability objectives, to be removed. The potential to link tourism recovery support programmes to environmental incentives was recognised, although there was some concern that many opportunities to do this may have already been missed. One panellist suggested that financial models should take account of the polluter pays principle, with implications for taxes, charges and pricing related to environmental costs. However, the panel felt that consideration also needs to be given to equity and inclusiveness issues in the application of such measures.

Aviation emissions present a major challenge for tourism. The fact that greenhouse gas emissions from aviation form a significant component of tourism's contribution to climate change was raised during the discussion. This led to suggestions that a high priority on funding from government, the industry and consumers should be given to research and development of alternative low-carbon aviation fuels.

Box 4. Sustainable tourism strategy and *Swiss-tainable* programme, Switzerland

Switzerland has a goal to be the leader in tourism sustainability. A new national tourism strategy has been established, with a focus on sustainability related to Switzerland's overall contribution to Agenda 2030 and the SDGs. A key element of the strategy is the [Swiss-tainable Programme](#), which is partly a marketing initiative to raise awareness of sustainability issues and opportunities amongst visitors and the local population. It also involves an innovative approach to tourism companies, who are promoted as sustainable based on their participation in one of the many recognised sustainable tourism certification schemes and labels.

A major role in delivering the strategy is given to local destination organisations, in consultation with local communities, as drivers of the green transformation. They are empowered to develop and deliver their own plans and objectives within the national framework and are provided with funding to implement sustainability actions. Some local destinations have committed to net-zero goals and this is spreading between them. Coordination is helped by [Tourism Forum Switzerland](#), which supports physical and virtual networking and training programmes.

Session 3: Towards a new future for tourism

High level scene-setting intervention

- **Ms. Rita Marques, Secretary of State for Tourism, Portugal underlined that data has never been more important than as it is now, to guide recovery from the pandemic and clarify the new normal for tourism.** The crisis had worked as an accelerator in exploring new metrics. Challenges in using new data should be recognised: it needs to be relevant, trustworthy and comparable, as well as complementary to existing data. In Portugal, official data from the national statistics office has been combined with new business data sets, and the need for transparency has been recognised by having an accessible knowledge management platform. Looking to the future, there is a need to pursue data on real time performance, demand changes, economic performance at different levels, and increasingly on tourism impacts and sustainability. In this, the international community needs to work together on sharing knowledge and developing comparable systems and indicators.

Panel 3a: Towards a data driven policy agenda for tourism

Moderator:

- Mr. Nadim Ahmad, Deputy Director, OECD Centre for Entrepreneurship, SMEs, Regions and Cities

Panellists:

- Mr. Michael Webster, Principal Analyst, Tourism Evidence and Insights, Ministry of Business, Innovation and Employment, New Zealand
- Ms. Titi Kanti Lestari, Director of Finance, IT and Tourism Statistics, BPS-Statistics Indonesia
- Mr. Jean-Philippe Monod de Froideville, SVP Global Government and Corporate Affairs, Expedia
- Mr. Carsten Olsson Head of European Businesses Unit, European Commission – Eurostat
- Ms. Sandra Carvao, Chief Market Intelligence and Competitiveness, UNWTO

The panel considered the need for new data capabilities to support the tourism policy agenda in a rapidly changing world. Significant improvements and innovative approaches are needed to adapt to the new data environment, meet changing user needs, and enable more effective data-driven policy decisions, including the integration of non-conventional data sources and methods into the tourism data ecosystem. The panel discussed existing data systems, the need for more timely and different evidence and how this can met, and the various issues and challenges involved.

Data needs to be fit for purpose in guiding policy, from the outset. The panel heard a strong plea for defining and understanding the purpose of any data collecting exercise before it is put in place, asking why it is needed and by whom. Data should clearly inform on policy priorities and guide and monitor any related action. The data sources and processes should be scrutinised to ensure that they are fit for the purpose identified.

The limitations as well as the contribution of new data need to be understood. Panellists emphasised the need to be clear about what new forms of data are actually measuring and the limits to their applicability and accuracy. A particular issue discussed was the representativeness of the data as affected by the source, i.e., whether it can inform on the behaviour of a target group without bias. Points raised included:

the need for clarity and agreement on definitions; the importance of avoiding double counting, especially when sources are combined; and the value of providing and using good metadata.

Many opportunities exist for gaining new insights by supplementing and combining data sources.

Examples presented by panellists showed the benefits of continuing with traditional sources and survey methods, while also supplementing these with the use of new data sources, such as big data, to improve timeliness and granularity. Examples from New Zealand and Indonesia are given in Box 5.

More progress is needed on tourism sustainability data and indicators. All the panellists recognised the increasing need to use data to inform on the social and environmental impacts of tourism, as well as economic performance. However, it was agreed that much more work and coordination is needed in this area, notably on identifying and agreeing on relevant sustainability indicators. Some initiatives are pursuing new approaches from which others can learn and which should provide a common framework in due course. For example, the UNWTO-led [Measuring the Sustainability of Tourism \(MST\)](#) programme has been piloting data initiatives in different countries on a range of sustainability topics, such as water and energy use, sector and gender pay gaps, support from tourism for protected areas, and local acceptance of tourism. Panellists suggested that opportunities may exist to work with bodies in other areas of government, such as social security, in identifying sources of relevant sustainability data. In general, it was concluded that in gathering data on sustainability it was important to avoid a silo approach and to learn from and work with other sectors of the economy and society.

More coordination and support is needed in planning and delivering data collection. *A poll of participants in the Global Forum asked them to identify the biggest challenge in using new sources of data for tourism. Availability (from a reliable source) and comparability were seen as the main challenges, but closely followed by capacity to analyse data and by access issues such as cost (Figure 6, Annex A).* The panellists also recognised the many challenges to be faced, referring to availability, high cost, limited financial resources, insufficient capacity and lack of skills. These challenges need to be addressed through better planning, coordination, prioritisation and investment. One panellist suggested that some rationalisation of existing data collection and surveys may be beneficial, to release resources and capacity to meet new needs. There was a clear call for more coordination between both users and suppliers of data, bringing together government and the private sector and promoting a partnership approach. New Zealand, for example, has advocated the creation of a panel of tourism data users to agree on priorities and to plan and co-design new approaches.

Box 5. Using new data sources to improve timeliness and granularity of tourism data

New Zealand: Experimental work to deliver more timely data on tourism performance at a more local level led to the establishment of the Monthly Regional Tourism Estimates data collection programme in 2016. This has been based on electronic card transactional data. During the pandemic, it was possible to provide weekly indicative data. The model has not been peer reviewed and the level of accuracy has not been calculated, but high volumes and percentages of card transactions are covered by the source.

Indonesia: To prepare the Tourism Satellite Account, traditional data sources have been supplemented by mobile phone data, which gives better coverage than household survey data and a better match with the supply side in the TSA Framework. In order to report against the Sustainable Development Goals, Indonesia needed to estimate tourism activity at a municipal level, which was not possible by simply using household surveys. Combining mobile positioning data with sample survey data on expenditure and behaviour has enabled evidence to be obtained with the necessary granularity and for less cost. Additional data on hotel bookings and ticketing, provided via commercial platforms, has also been used. The process has involved considerable negotiation with the sources.

The position of private sector companies as tourism data sources should be understood. Panellists discussed the interests and motivations of tourism service providers, especially intermediary bodies such as online travel and marketing agencies or communication companies, which have access to high volumes of relevant data. They felt that it was important to understand their position as potential suppliers and partners. There is a need to ensure commercial confidentiality, which may be assisted through the aggregation of data and engagement with more than one company. Motivation to supply data, for example relating to sustainability, may be linked to corporate social responsibility but may also reflect a self-interest by the companies in improving the performance of the tourism ecosystem.

Collaboration between seekers of data may improve efficiency and lower costs. The panel noted that many tourism stakeholders, including destinations and businesses, are seeking similar data from the same sources. Commercial companies are often inundated with similar requests. The panel recommended greater collaboration in this process, for example in providing data at scale for dissemination to the end users.

Improved data gathering and analysis should be matched by increased transparency and accessibility. Panellists were concerned that new and improved data on performance, markets and sustainability should be as widely used as possible, including by small businesses. Evidence was provided that indicated that data transparency and communication could be improved. For example, the UNWTO presented information which showed that levels of public reporting on tourism and environmental performance is considerably lower than levels of monitoring.

Panel 3b: High-level Panel on the Future of Tourism

Moderator:

- Ms. Lamia Kamal-Chaoui, Director, OECD Centre for Entrepreneurship, SMEs, Regions and Cities

High level panellists:

- Ms. Isabel Alvarez, Vice Minister for Tourism, Peru
- Ms. Vasiliki Loizou, Secretary General for Tourism Policy, Ministry of Tourism, Greece
- Mr. Jang-ho Kim, Director General for Tourism Policy, Ministry of Culture, Sports and Tourism, Republic of Korea
- Mr. Miguel Sanz Castedo, Director General, Turespaña, Spain
- Mr. Tomohiro Kaneko, Vice Commissioner, Japan Tourism Agency, Ministry of Land, Infrastructure, Transport and Tourism
- Ms. Rita Marques, Secretary of State for Tourism, Portugal

The final panel brought together high-level policy makers with responsibility for tourism, who provided an update on the tourism policy response to COVID-19 and the outlook for recovery in their country, together with key policies and initiatives for delivering a more sustainable and resilient future for tourism. The main policies and actions presented by the panellists are summarised in Box 6.

Taken together, the interventions by the high-level panellists paint a picture of the policy priorities and opportunities for the future of tourism. Key points arising from the high level interventions can be summarised as follows:

- The recovery of the tourism sector, and the building of a more resilient, inclusive and sustainable tourism economy which is responsive to community needs and major environmental challenges, requires a **strategic approach and a combination of vision, leadership and collaboration**.

- The COVID-19 pandemic had a devastating impact on tourism. Recovery is now apparent but is stronger in some countries than others and the outlook is somewhat uncertain. **Supporting businesses, promoting safe mobility and building traveller confidence, supported by vaccination rollout, remains a priority.**
- The significance of tourism to the economy and sustainable development of many countries has been made clearer by the pandemic, with **tourism often given a priority in recovery and development strategies.** Ongoing attention needs to be paid to the positioning of tourism within the overall economy, including inter-sectoral linkages.
- The **relevance of sustainable tourism policies, strategies and action programmes is even stronger**, in a world where sustainable development goals and climate change commitments have become central to the policy agenda.
- The **need and opportunity for the diversification of tourism products and markets is well recognised.** Domestic markets have been given more attention and may play a stronger part in the future of tourism. New visitor experiences are being identified and promoted which reflect the growing consumer interest in nature and cultural heritage and concerns about the impact and sustainability of travel. Structural shifts in the market, notably for business tourism, need to be addressed and are evoking new and innovative responses.
- The need to pay **more attention to the management of tourism at a local destination level is also increasingly recognised**, and has been reflected in support for destination management organisations and strengthening governance structures involving public, private and civil society interests. This has included the promotion and recognition of smart and sustainable destinations.
- The opportunities for tourism presented by digital transition have been widely recognised, enabling improved management, services and communication. **Digitalisation needs to be rolled out further and faster, reaching all parts of the tourism ecosystem.**
- **Staffing and labour issues facing the sector have been exacerbated by the pandemic** and may require more strategic attention moving forward. Training programmes have been actively supported by some countries during the pandemic, including in areas of sustainability and safety.
- **Many countries are taking steps to meet the need for improved tourism data, building on experience from the pandemic.** The importance of strengthening the bridge between data and policies, as a key requirement of a new resilient and sustainable tourism economy, has been expressed in strategic approaches and should lead to further implementation.
- The **importance of working together at all levels towards a sustainable future, including public-private engagement**, is reflected in recent strategies and approaches to tourism governance. The need for international cooperation and coordination is also recognised and has been explicitly stated by some countries. This includes the need for a global dimension, with new efforts to help all countries in their recovery from the pandemic and their path to a more sustainable future.

Box 6. Key initiatives in pursuing recovery and a sustainable future for tourism

Peru: Climate change is a key focus in Peru, with emissions targets and related legislation providing a context for a tourism strategy focused on developing a sustainable, competitive, quality and safe tourism destination. Action is being taken to promote climate management in tourism services, including measuring the carbon footprint as a performance indicator. The National Tourism Quality Plan includes measures to incentivise good environmental practices in tourism enterprises, as well as bring together all actors at different levels of government to respond to global trends in sustainable tourism.

Greece: A swift response to COVID-19 started with fiscal measures to support tourism enterprises, followed by a policy of safe re-opening and the coordination of national and European measures and rules. In its 10-year strategic plan for sustainable tourism development, Greece is introducing a new paradigm which is greener, more digital, more diverse and with a strong regional perspective. Emphasis is placed on extending the season, working with destination management organisations, promoting digital transformation in services, infrastructure and human capital skills, and improving data to strengthen resilience. The National Observatory for Sustainable Tourism Development has regional and local antennae, and new data is being employed to guide the strategy.

Republic of Korea: Steps towards strengthening recovery in tourism have involved stimulus measures and financial support, followed by a phased ease of travel restrictions and introducing a safe travel campaign, with 100 safe destinations across the country. Korea is leveraging its digital know-how to support recovery and transition to a more sustainable future. A Tourism Data Lab uses a variety of data sources to provide helpful information for businesses and to assist in more sustainable and safe visitor management. A Smart City initiative is delivering improved services to visitors. Digital transition is also being helped through providing IT personnel and support for technological development.

Spain: The recovery strategy has focussed on a strong vaccine rollout and work with airline and tour operators to restore connectivity. The medium to long term strategy is for sustainable tourism growth. Spain's overall Recovery, Resilience and Transformation Plan is aligned with the SDGs and contains significant recognition and funding of the tourism sector. Key components include: destination sustainability, including social and environmental measures; diversification of tourism products (thematic and territorial); energy efficiency; conservation of heritage sites; strengthening the tourism retail sector; and a new digital strategy for tourism.

Japan: Action to maintain employment and support business continuity has included efforts to boost domestic travel demand and demonstrate model tours that recognise vaccination certificates and PCR tests. The pandemic has stimulated travellers and businesses to address sustainable tourism and meet new tourists' needs and opportunities. Diversification is key to the approach, with new value-added products linking sectors, such as tourism and agriculture, and developing new types of products, such as the 'workation' combining work and leisure. A new programme has introduced the Japan Sustainable Tourism Standard for destinations. Crisis management guidelines have also been developed.

Portugal: Tourism is a key sector in Portugal, helping to rehabilitate cities and provide a livelihood for rural areas. COVID-19 has accelerated and upgraded a programme that was already underway. The Tourism Strategy 2027 continues to provide a focus even during the pandemic. It has been supplemented with the Tourism+Sustainable Plan, to accelerate green transformation and meet the SDGs, and the Reactivate Tourism – Building the Future programme, with 4 axes: supporting companies; promoting safety; generating business; and building a smarter and more sustainable future. Initiatives include: engaging in international coordination; responding to demand trends, such as 'digital nomads'; digital capacity building; and training that links sanitary, sustainability and digital competences.

Closing session

In his closing remarks, **Mr. Jang-ho Kim, Director General for Tourism Policy, Ministry of Culture, Sports and Tourism, Republic of Korea** highlighted the important contribution of this Global Forum to expanding on the future paradigm of tourism. Over the course of the three days, the Global Forum had addressed many issues, including the response to the pandemic, the roles of government and the private sector, the importance of data innovation and evidence-based policies and the role of tourism in making the transition to a greener economy assisted by digitalisation. He stressed that the issues discussed were not challenges that could be resolved by any one single country. They are global issues, so all countries must share the solutions and the vision for the future, and Korea will continue to play an active role in advancing this agenda.

Ms. Lamia Kamal-Chaoui, Director OECD Centre for Entrepreneurship, SMEs, Regions and Cities noted that this Global Forum provided an important platform to progress the crucial task of restarting and reimagining tourism and developing a stronger, fairer and more sustainable tourism economy. This was the 16th edition of the Global Forum but the first in its new format combining knowledge, policies and statistics. It has provided a timely opportunity to emphasise the bridge between policy and data and to stress the need for cooperation between governments, the private sector and the wider community, at what is a critical time for the tourism economy. Advancing this common recovery and transformation agenda for tourism will only be possible if we continue to work together. The OECD stands ready to support the global community to support this tourism agenda.

Annex A. Results of participant polls

During the different sessions of the Global Forum, participants were invited to respond to polls on the online platform to inform the discussions. The results of these polls are set out below.

Panel 1a: Building Tourism Resilience

Figure 1. What is the most important challenge for the resilience of the tourism sector?



Source: Poll of participants in Global Forum on Tourism Statistics, Knowledge and Policies 2021

Panel 1b: Data innovations and experiences to take from the crisis

Figure 2. What is the main data priority to support the tourism recovery?



Source: Poll of participants in Global Forum on Tourism Statistics, Knowledge and Policies 2021

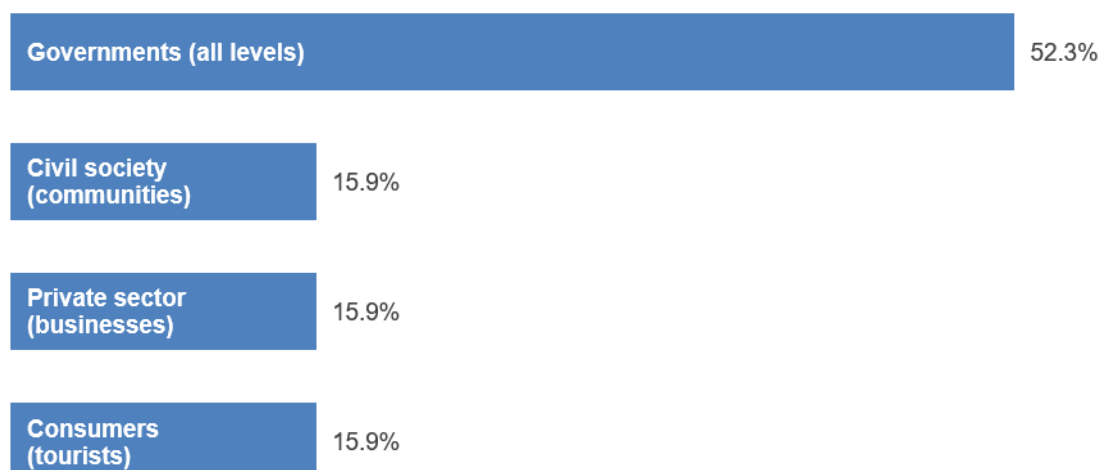
Figure 3. Do you think the crisis has created momentum to improve the measurement of tourism?



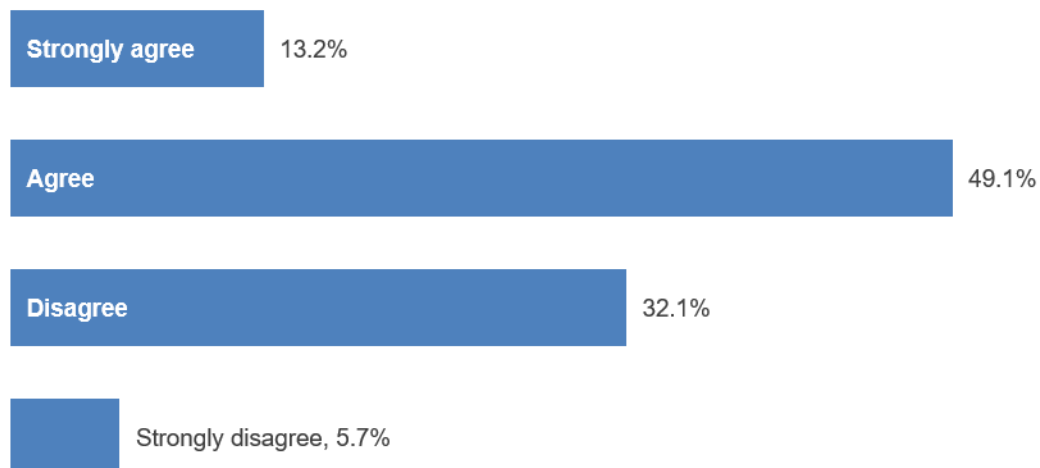
Source: Poll of participants in Global Forum on Tourism Statistics, Knowledge and Policies 2021

Panel 2a: Driving the recovery to support people, businesses and places

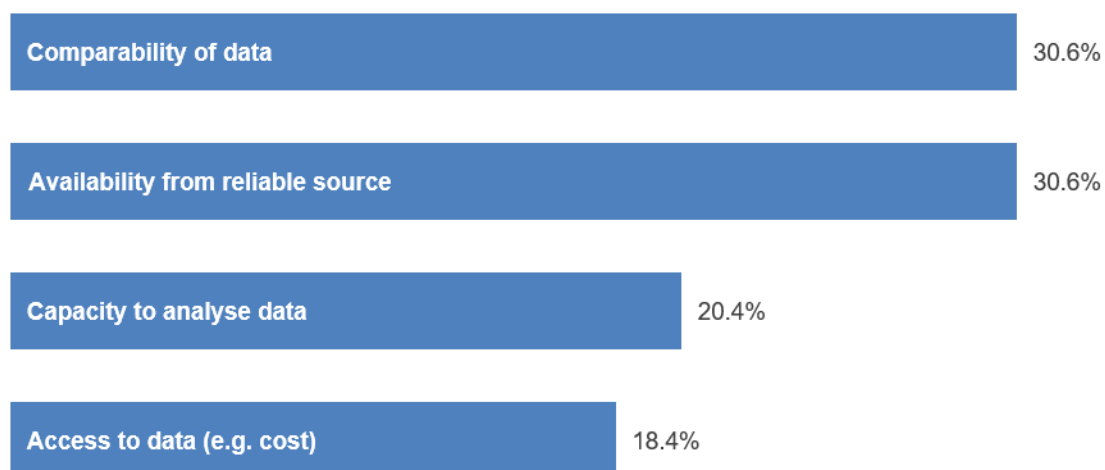
Figure 4. Who will be the most important actors in making the tourism ecosystem more sustainable?



Source: Poll of participants in Global Forum on Tourism Statistics, Knowledge and Policies 2021

Panel 2b: Building a greener, more sustainable tourism economy**Figure 5. Do you agree we are on track to build a greener, more sustainable tourism economy?**

Source: Poll of participants in Global Forum on Tourism Statistics, Knowledge and Policies 2021

Panel 3a: Towards a data driven policy agenda for tourism**Figure 6. What do you think is the biggest challenge in using new sources of data for tourism?**

Source: Poll of participants in Global Forum on Tourism Statistics, Knowledge and Policies 2021