Issues paper

OECD GLOBAL FORUM ON TOURISM STATISTICS, KNOWLEDGE AND POLICIES

Reshaping tourism for a more resilient and sustainable tomorrow

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About the OECD Tourism Committee

The Organisation for Economic Co-operation and Development's (OECD) mission is to promote policies that improve the economic and social well-being of people around the world. The OECD Tourism Committee, created in 1948, acts as the OECD forum for exchange and for monitoring policies and structural changes affecting the development of domestic and international tourism. It actively promotes the sustainable economic development of tourism.

OECD Global Forum on Tourism Statistics, Knowledge and Policies

The OECD Global Forum on Tourism Statistics, Knowledge and Policies brings together senior policy makers, statisticians, and leaders from the private sector and civil society to exchange ideas, views and experience. The 2021 edition of the Global Forum is hosted by the Ministry of Culture, Sports and Tourism of the Republic of Korea, on the theme *Reshaping tourism for a more resilient and sustainable tomorrow*. It will provide 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.

Introduction

1.　　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 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 also 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.

2.　　Immediately prior to the pandemic, international tourist arrivals stood at around 1.5 billion in 2019. By the beginning of 2021, international arrivals globally had declined by 88%, compared with pre-pandemic levels. The recent June to August period has seen a moderate improvement, with international arrivals in July 2021 67% lower than in the same month in 2019[1], the strongest result since April 2020. International travel has been slowly picking up from very low levels, driven by the global vaccination rollout and relaxation of travel restrictions in Europe and the Americas in particular, and air travel is projected to reach 61% of 2019 levels in 2022.[2] However, the recovery remains fragile and uneven.

3.　　The economic impact of this decline in tourism is far reaching. It has been estimated that 100–120 million direct tourism jobs have been threatened by the crisis[3], with a disproportionate impact on women, young people and informal workers[4]. Indirect effects are significant, owing to linkages to upstream sectors such as agriculture, with a drop in tourist sales leading on average to a 2.5-fold loss in real GDP in the absence of any stimulus measures.[5] Overall, it is estimated that global economic losses could range between USD 1.7 and 2.4 trillion in 2021[6].

4.　　The speed and extent of recovery in international tourism will depend on the removal of travel restrictions and the rebuilding of traveller confidence. Critical to this will be the uptake of vaccination in source and destination countries. Coordination of policies and measures, supported by effective and trusted communication, will play a vital part in underpinning the safe restart and recovery of international travel and tourism. This will take time. According to a recent survey of OECD countries, the sector is expected to rebound in 2022, but recovery may take as long as 4-5 years[7].

5.　　In addition to the impact on, and recovery of, international travel, a range of other factors have affected the short and longer term impact of the pandemic on tourism. In some countries, market diversification and a growth in domestic tourism has gone some way to compensate for the loss in international tourism spending, providing opportunities for certain destinations but not for others. On the supply side, many governments have provided financial support, fiscal relief and job retention programmes, applied generally across all industries or specifically targeted to meet the needs of the tourism sector and its workforce. 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.

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[1] UNWTO World Tourism Barometer, September 2021

[2] IATA Airline Industry Economic Performance, October 2021

[3] UNWTO World Tourism Barometer, January 2021

[4] The impact of COVID-19 on the tourism sector, ILO briefing note, 2020

[5] COVID-19 and Tourism, an update – Assessing the economic consequences, UNCTAD, 2021

[6] UNCTAD, 2021 *ibid*

[7] OECD Survey on Supporting recovery and building a more resilient tourism economy, October 2021

6.	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.

7.	These issues are relevant in all parts of the world, 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.

8.	Global, regional and national variations in the impact of the pandemic on tourism and on the path to a sustainable recovery should also be borne in mind. Developing countries, in particular, may be less well placed than others, owing to a more limited roll out of vaccination and fewer opportunities to diversify the market towards domestic visitors, with consequences for communities and the maintenance of natural resources.

9.	The Global Forum on Tourism Statistics, Knowledge and Policies, 2021, provides an opportunity to examine and discuss these issues, identify good practice and agree on common priorities and directions. The Global Forum has three working sessions: firstly, on lessons from the COVID-19 pandemic and how to address further crises and establish a more resilient tourism sector; secondly, on shaping the recovery and building back to a greener, more inclusive and sustainable tourism economy; and thirdly, on new data requirements and capabilities to support tourism policy and planning in a rapidly changing world, with a concluding High Level Panel exchanging views on how the outlook for recovery and vision for the future tourism policy agenda.

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

10.   The COVID-19 pandemic has demonstrated the susceptibility of travel and tourism to global crises and the need for actions to manage the response and mitigate the impacts. It has also revealed gaps in government and industry preparedness and has helped to highlight areas to address in strengthening resilience to future crises. While knowledge of the pandemic is still fresh and current, it is timely to draw lessons from governments and the industry based on their experiences, actions and the results achieved. A consideration of what worked well and less well should help to identify where capacity needs to be strengthened and policies and actions amended or improved. This should include the use of data and related tools to keep abreast of the crisis and to inform policy, management and business decisions.

Building tourism resilience

11.   Crisis management covers preparing for and responding to shocks, while resilience goes beyond this and includes adaptation in the aftermath of disruption[8] as well as avoidance and minimisation of future impacts. Building resilience can be strengthened by reflecting on previous crisis management. Information on actions taken by governments to mitigate and manage impacts on the tourism sector and build recovery and resilience has been collected at stages during the COVID-19 pandemic[9]. This session of the Global Forum provides an opportunity to share experiences and learnings from the pandemic. Some key issues and questions for discussion are outlined below.

12.   A primary concern is that the position and needs of travel and tourism should be fully appreciated and understood at the highest levels of government. It is furthermore important that these considerations are properly integrated into policies and processes for crisis management and for recovery, resilience and sustainability across the economy as a whole. This is likely to require multi-sector and multi-stakeholder governance and engagement structures, which firstly bring together the main areas of government affecting tourism and secondly ensure that private sector tourism bodies and industry leaders are fully involved in planning and management. Engagement and implementation structures, with sufficient capacity to be effective, are also required at lower levels.

13.   Engagement structures should inform and be informed by tourism policies, strategies and plans which incorporate crisis management and resilience. These in turn should be evidence based, supported by data and monitoring, and sufficiently flexible to respond to changing circumstances. It will be important to consider whether there was sufficient planning prior to the pandemic and what should now be in place.

14.   Clear, consistent and helpful communication with stakeholders is well understood as a vital tool in crisis management and future resilience. It should include messages aimed at businesses, existing visitors, intending travellers and future markets. It is essential in enabling adaptive management and in building confidence and recovery. Practical lessons on communication should be taken from the COVID-19 crisis.

15.   A key factor affecting the resilience of the sector is the fragility of many micro and small tourism businesses. Many governments have provided support programmes for them, which have been more or less targeted. Examples include wage subsidies (including furlough schemes), tax deferrals, debt moratoria and financing instruments.[10] Lessons should be learned from their varying effectiveness. This in turn should help to inform future policies and programmes aimed at strengthening the resilience of such businesses and the sector as a whole. Going forward, it is important to adjust support to avoid an upsurge in nonviable firms and tmove from liquidity support to the use of finance for encouraging societal objectives.

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[8] A systematic resilience approach to dealing with COVID-19 and future shocks, OECD, 2020

[9] E.g. Mitigating the impact of COVID-19 on tourism and supporting recovery, OECD, 2020

[10]   OECD (2021), *Coronavirus (COVID-19): SME Policy Responses, updated 15 July 2021*, https://www.oecd.org/coronavirus/policy-responses/coronavirus-covid-19-sme-policy-responses-04440101/#tablegrp-d1e3211.

16.   The COVID-19 pandemic has shown how some destinations with a very heavy dependency on international tourism as a source of economic livelihood have been particularly heavily impacted. A move to greater resilience may require a broadening of local economies to include other sectors. Within the tourism sector itself, some countries have been successful in attracting a higher proportion of domestic tourists who have provided a lifeline for many businesses. Strategies for diversifying the tourism product and market are highly relevant to building resilience. It will be helpful to share experiences and lessons gained from actions to promote to domestic and alternative markets during the crisis.

17.   Building resilience is partly about better anticipation and avoidance of risks. Governments, industry bodies and international agencies may wish to consider how they can work better together in future to share information and intelligence on possible upcoming threats to the tourism sector.

Topics for discussion

- How could governments and industry have been better prepared for this crisis?

- What response measures were most effective and what could be improved to ensure resilience to future crises?

- How may structural, product and market changes in emerging from the pandemic affect the tourism sector's future resilience?

- How should tourism policies be reshaped to tackle the challenges and take advantage of the opportunities, and what governance and coordination structures are required to deliver them?

Data innovations and experiences to take from the crisis

18.   The challenging situation found in most crises places particular requirements on the collection, processing, assessment and dissemination of data. Data is required by government and industry, to keep abreast of business performance and needs, provide feedback on traveller reactions, intentions and confidence, and monitor the impact of measures taken. Processes may need to be more frequent and swifter than usual in order to keep abreast of fast-changing circumstances and inform pressing decisions. Data may also need to be more focussed and detailed to distinguish between the needs of different locations and sub-sectors.

19.   The COVID-19 crisis has highlighted shortcomings in the availability of timely, comparable data to support policy and business decision making. Some regular collection processes have themselves been disrupted by the pandemic. This has resulted in the search for alternative data sources and some countries have implemented new research programmes. New methods of accessible presentation and outreach have also been used. An example is the use of monitoring tools or dashboards providing easily accessible, timely and locally relevant data. Lessons from this experience should be shared and can help to inform future approaches in the short and long term.

20.   Additional issues relating to data needs and opportunities to support a sustainable tourism policy agenda are covered at the end of this paper, relating to the final session of the Forum.

Topics for discussion

- What data challenges to provide necessary and reliable information to decision makers in a timely and granular manner were revealed by the pandemic, and how were these met?

- What data innovations and statistical responses and learnings emerged to meet policy and business needs, and what learnings to strengthen the tourism data ecosystem?

- What innovative data approaches and indicators can be used to evaluate the effectiveness of policy support measures and monitor the recovery?

Session 2: Recovery and beyond: building tourism back better

21.   The COVID-19 pandemic and the process of shaping the recovery from it provides a unique opportunity to rethink the tourism system and move to stronger, more sustainable models of tourism development and accelerate the shift to a greener and more inclusive sector. Issues of resilience are closely linked to those of long-term sustainability, which include the need to address key socio-economic and environmental challenges in the future planning and management of tourism.

22.   The opportunity to build tourism back better has been recognised and expounded by various international bodies[11] and individual commentators. Comparative studies have identified a framework of requirements and relevant approaches being taken by governments and the industry[12], some of which had been initiated before the pandemic but which can now be viewed through a new lens. Consideration should be given to the necessary policy priorities and frameworks, backed by relevant instruments such as the use of investment, fiscal measures and financial and other incentives to stimulate sustainable tourism. The Global Forum provides an opportunity to discuss common challenges, opportunities and progress in the preparation and implementation of sustainable tourism policies, plans and initiatives.

Driving the recovery to support people, businesses and places

23.   Socio-economic aspects of sustainable tourism centre around concepts of inclusiveness, delivering fair and equitable benefits and opportunities from tourism for all those involved. Policies may now seek to articulate a new vision of tourism success, based not on demand generated but on outcomes for people, businesses and communities, leading to greater personal wellbeing and quality of life.

24.   Ensuring a successful recovery is arguably the initial priority. Providing the right conditions to facilitate travel is both a short and a long-term requirement, involving measures to foster traveller confidence and enable safe mobility. Relevant action areas include: consistent approaches to health testing, vaccination and documentation; maintaining and promoting health and safety protocols; providing clear and timely visitor information; facilitation of more seamless travel, such as through agreed use of digital traveller identity and contactless transaction; and investment in accessible transport infrastructure.

25.   Policies for developing resilient, inclusive and sustainable tourism beyond recovery may require a focus on local destinations. Ongoing trends in tourism demand, together with the impact of the pandemic, have consequences for the performance of different markets and products, including the need for diversification. This may call for the development of alternative levels, patterns and types of tourism according to the potential, but also to the actual needs, of different local areas. Many areas are placing a new priority on destination management planning, addressing issues such as the geographic and temporal spread of visitation, and involving close consultation with local communities.

26.   Priorities will vary between different types of destination. In some countries, rural areas have experienced heightened pressures from tourism during the COVID-19 pandemic, requiring a new approach based on visitor management and community-based development models. Many cities have seen dramatic declines in business and leisure tourism in the last two years, with a need to carefully reshape and build back MICE[13], retail, arts, and heritage-based tourism without returning to the former excesses of over-tourism found in some areas.

27.   The delivery of benefits from tourism depends heavily on the success of individual businesses, including SMEs which make up a large majority, around 85%, of the enterprises in the sector. Policies should seek to move from the provision of direct support during the pandemic, to fostering viability, innovation and sustainable growth. Examples of actions would include: strengthening partnerships and

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[11] E.g. COVID-19 and Transforming Tourism, United Nations, 2020; One Planet Vision for a Responsible Recovery of the Tourism Sector, UNWTO One Planet Sustainable Tourism Programme, 2020.

[12] Managing Tourism Development for Sustainable and Inclusive Recovery, OECD, 2021

[13] Meetings, incentive, conference and exhibitions

collaboration with and between businesses, including cluster development; researching local value chains and seeking to fill gaps in them; identifying and addressing labour and skills needs; and supporting investment in innovation. Policies should also take account of issues of equitable employment and the promotion of opportunities for women, youth, minorities and other vulnerable groups.

28.   Promoting widespread and equitable access to digital opportunities is increasingly important for inclusiveness in the sector. Studies have revealed a 'digital gap' arising from poor access to skills and technology, especially amongst small tourism businesses[14]. Relevant action areas include: developing programmes of digital skills education, training and other support; fostering innovation and the uptake of particular technologies; and investing in necessary infrastructure to enable widespread digital coverage. The COVID-19 pandemic seems to have accelerated digital uptake by SMEs, but less so amongst the smaller ones. They can benefit not only from government support but also from targeted initiatives from the private sector.[15]

29.   A new focus on inclusiveness and on delivering benefits for people, as well as businesses, raises issues of valuing and measuring the benefits of tourism to consumers, i.e. to the travellers and visitors themselves, including mental wellbeing and educational benefits and the furtherance of cultural awareness and understanding.   Related issues include expanding such opportunities for all, through better accessibility and following principles such as universal design.

Topics for discussion

- What medium and long term consequences of the pandemic and structural changes for the tourism economy, affecting people, businesses and places?

- What reform measures, including policies, finance and other instruments, to build back better through the tourism ecosystem?

- How to adjust to changes in tourism consumption patterns, promote innovative and inclusive business models, address skills/labour needs, and rebuild destinations to benefit local communities?

- How to support the digital transformation of tourism, and enable all tourism stakeholders to benefit fully from digital opportunities?

Building a greener, more sustainable tourism economy

30.   Green transformation of the tourism economy is one of the key topics in the G20 Rome Guidelines for the Future of Tourism[16] and is central to other agendas proposed to build tourism back better. The main issues and challenges include: significant and growing CO_2 and other emissions, arising primarily from transport but also from business operations and imbedded in consumables used throughout the supply chain; use of non-renewable and scarce resources, notably high levels of direct and indirect water consumption per head, with particular concerns in areas of water shortage; production of waste, including significant levels of food waste and use of non-renewable plastics, together with poor disposal in some areas, with associated pollution; and pressure from development and tourism-related activity on precious land and natural resources, including degradation of landscapes and loss of biodiversity through disturbance to wildlife and disruption of habitats. Issues also include addressing the impact of environmental change on tourism, rather than vice versa, such as adaptation to climate change.

31.   The COVID-19 pandemic has led to a greater awareness of these issues related to tourism, especially amongst visitors and local communities, providing an enhanced incentive and opportunity to

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[14] Preparing the Tourism Workforce for the Digital Future, OECD, 2021

[15]   OECD   (2021),   *OECD   SME   and   Entrepreneurship   Outlook   2021*,   OECD   Publishing, Paris, https://doi.org/10.1787/97a5bbfe-en.

[16] G20 Rome Guidelines for the Future of Tourism, OECD Report to G20 Working Group, OECD, 2021

tackle them. Consumer pressure from travellers adds to the commercial case for green transformation, with increasing numbers of tourism businesses committing to better management practices. Positive benefit from tourism, such as in the valuing of biodiversity, should be identified and reflected in policies.

32.   It has been estimated that tourism's contribution to global greenhouse gas (GHG) emissions ranges from between 5% and 8%, with transport accounting for around three quarters of the tourism total[17], with implications for eco-efficiency of services and alternative travel patterns. Transportation related GHG emissions from travel and tourism present a particular challenge. The majority of these emissions come from aviation, with a significant proportion also generated by car transportation. Key issues for policy and action include providing for and promoting the use of greener transportation options, such as rail, cycling and walking, and supporting urgent research into environmentally friendly aviation fuels and energy sources. Policies might also consider the consequences for future travel patterns, for example in considering net emissions per visitor night in prioritising different markets, taking into account factors such as transport used and length of journey and stay.

33.   Effective destination management is important in addressing environmental as well as socio-economic impacts, focussing on sound physical planning, the management of visitor flows and activities, and the provision of relevant infrastructure and waste management services. The principles of sustainable tourism development and management are the same in all areas, but the needs of different types of destination will differ. In coastal areas, tourism policies and plans should be closely integrated with wider coastal zone management and marine protection policies and priorities and promoting a sustainable blue economy. Similarly, in rural areas there is a need to work closely with national parks and other protected areas on sustainable tourism management. Cities may have individual environmental challenges, affected by local circumstances.

34.   A key requirement of green transformation in the tourism sector is to secure the engagement of businesses of all sizes in the reduction of emissions, waste and other environmental impacts arising from their operations. Policies can promote transition towards a more circular economy throughout the tourism value chain. Possible actions may involve the use of regulations, financial incentives and the promotion and dissemination of good practice, including the provision of relevant advice and skills training. Opportunities may lie with the provision of signals in the marketplace, such as through promoting the certification of sustainable tourism businesses based on internationally agreed standards.

35.   Policies towards more sustainable tourism should be closely aligned to wider high-level policies for sustainable development and to related international commitments. This will be helped by governance frameworks which include environmental ministries, agencies and expertise, alongside industry representatives. The importance of local management action, as identified above, points to the need to also reflect such frameworks within individual destinations.

Topics for discussion

- What are the priorities in the transition to greener and more sustainable models of tourism development, and should these models be differentiated across destinations?

- What challenges and opportunities for tourism to contribute to transition to a decarbonised economy?

- How to encourage the greening of tourism business models, value chains and destinations, and transition to a more resource efficient tourism sector?

- How to strengthen tourism policy and governance frameworks, and improve the capacity of government and private sector to develop tourism sustainably?

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[17] Supporting the transition to a green tourism economy – scoping paper, OECD, 2021

Session 3: Towards a new future for tourism

36.   The delivery of tourism that is more sustainable and resilient requires the development and implementation of polices that are evidence based and informed by relevant data. The final session of the Global Forum will consider the need for new data capabilities and processes in order to address the challenges identified for building back better. It will end with a High Level Panel which brings together policy makers with responsibility for tourism to exchange views on how they see the outlook for recovery and their vision for future tourism policy.

Enabling a data-driven policy agenda for tourism

37.   Traditionally, tourism data has focussed on the measurement of visitor volumes and expenditure. The need to cover a wider set of outcomes, including economic, social and environmental impacts, has been recognised for some time. Various studies and international initiatives have been addressing the challenges, including UNWTO's work on the Statistical Framework for Measuring the Sustainability of Tourism (SF-MST). The importance of this has been further underlined during the COVID-19 pandemic.

38.   There is a two-way relationship between data and policies. An identification of issues should point to areas where evidence and data are needed, which informs the formulation of policy. The policy agenda will in turn set out goals, targets and actions, to be monitored through the use of data, leading to necessary amendment down the line. The establishment of indicators, related to policy objectives and against which outcomes and progress can be measured, is an important part of this process. Indicators are needed for a range of policies areas, including the extent and shape of economic recovery, the uptake of digitalisation and the transition to greener, more inclusive and more sustainable tourism.

39.   Key indicators for sustainable tourism have been the subject of ongoing debate. Particular topics that indicators might cover include, amongst others: employment benefits (jobs supported, wage levels, gender balance etc.); level of GHG emissions; water and other resource usage; waste generation and levels of pollution; and level of residents' satisfaction with tourism. Quantification may be per sector or per visitor. To be effective in informing policy, indicators need to be applied and monitored at both a national and a local destination level. If they can also be agreed globally, they can provide a basis for valuable comparison and benchmarking between countries.

40.   Indicators are only of value when the data exists to measure against them. Some issues and challenges for the identification of indicators and for related data collection and analysis include: the cost and time involved in gathering the data, notably when new surveys and investigation may be required; the availability of capacity, skills and resources to undertake the work, especially at a local level; the ability to gain and maintain the interest and participation of necessary stakeholders, including individual tourism businesses; and the need for the process to be maintained over the long term in order for trends to be fully identified. For these reasons, some commentators have pointed to the need to design systems that are practical and achievable[18], which may be based at least initially on just a small number of key indicators.

41.   Issues of cost and the long term maintenance of processes point to the advantage of building on existing data collection activity where possible. For example, some countries and destinations may already have sustainability indicator systems in place for the economy as a whole, for monitoring delivery against the SDGs, providing an opportunity for tourism impacts and influences to be disaggregated from this. Elsewhere, data collection on specific topics, such as water use and pollution levels in local destinations, could be used to monitor against tourism indicators.

42.   New data sources, such as the collection and storage of big data, may provide the basis for additional and innovative ways of gathering evidence to support tourism sustainability and management. Examples include the use of satellite data to monitor visitor flows. Pursuing opportunities for innovation

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[18] E.g. The impact of sustainable tourism indicators on destination competitiveness: the European Tourism Indicator System, Font X., *et al.* Journal of Sustainable Tourism, 2021.

and combination of methods and sources should pay particular attention to possibilities presented by the private sector, including coverage of data on the collaborative economy and provision of data from platforms. Some of this data may be commercially sensitive or have implications for personal privacy, with possible requirements for global and national agreement and regulation of its use. Policies and actions should ensure transparency and clarity regarding the source and collection of data and how it will be used.

43.   In considering these issues, the Global Forum should keep in mind the overall challenge for tourism statistics going forward. This has been outlined as the need to strengthen the system of tourism statistics to provide more timely, relevant, granular and comparable data to monitor the effectiveness of tourism policies and recovery measures, taking into account the economic, environmental and social dimensions of tourism[19]. Governments and industry stakeholders may be encouraged to consider a future agenda, which envisions what can be achieved within a certain time frame. This could provide the basis for specific tourism data strategies as a key component of overall tourism planning.

44.   The importance of the relationship between evidence and policy means that sufficient capacity and resources are required for the design and implementation of new data approaches. This should be reflected in governance and delivery structures, including the potential involvement of statistical and research bodies and institutions. A particular challenge may be to ensure sufficient priority as well as capacity is afforded to data collection at the local destination level, which is critical to sustainable tourism management. This may require the provision of resources and incentives as well as guidance, together with due consideration of the need for regulatory requirements for the collection of data.

Topics for discussion

- Are current systems of tourism data and statistics sufficient to measure the economic, environmental and social dimensions of tourism?

- What are the current gaps in tourism measurement frameworks?

- What role can new and non-conventional data sources play in filling existing and emerging data gaps, and how can these be integrated into tourism data systems?

- What approaches can be used to deliver more timely and granular data?

- What priorities and improvements to support a data-driven policy agenda, and provide a sufficient evidence base for the development and evaluation of tourism policies and actions?

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[19] Renewal and Revision of the Mandate of the Working Party on Tourism Statistics, OECD, May 2021

High Level Panel on the future of tourism

45.   In looking towards a new future for tourism it is important to reflect on key changes and challenges in the sector which had been apparent for a number of years, some of which have been addressed during this Global Forum. Recent megatrends affecting tourism have included[20]: evolving visitor demand, with growth in emerging, elderly and younger markets seeking new forms of experience; climate change impacts, increasing greenhouse gas emissions and pressures on the natural environment and local communities from unchecked tourism growth; expanding potential and use of digital technologies affecting many aspects of tourism; and growing expectations of safe, accessible and seamless travel mobility. These trends were apparent within a general background of almost continual annual growth in global tourism and commensurate forecasts for the future.

46.   The COVID-19 pandemic has interrupted but not necessarily halted these trends. A clear picture of the future of tourism in the short or longer term has not yet emerged. Alternative scenarios are affected by issues such as the length and depth of the crisis and attitudes to it of consumers and other stakeholders, including businesses and governments[21]. How this plays out will influence whether the result will be essentially business-as-usual or a new normal based on changed attitudes to tourism and conditions affecting its profitability, shape, scale and impact.

47.   While the outcome may be unknown, the disruption from the pandemic has demonstrated the economic significance of travel and tourism and the need to strengthen its resilience. It has also been widely recognised that the crisis provides an unprecedented opportunity to re-think and reshape the future of the sector.

48.   Various international organisations and global groupings have elucidated and sought to address the implications for tourism arising from COVID-19 in the context of previous trends. In May 2021 the *G20 Rome Guidelines for the Future of Tourism[22]* were endorsed by the meeting of G20 Tourism Ministers, who committed to take action in seven inter-related policy areas: safe mobility; crisis management; resilience; inclusiveness; green transformation; digital transition; and investment and infrastructure. The guidelines, developed by OECD with the close co-operation of the G20 Italy Presidency and the OECD Tourism Committee, provide a direction to be followed globally and within individual countries. This will require further prioritisation, policy affirmation and action planning.

49.   Fundamentally, the challenge is to promote and achieve recovery of the tourism sector on the one hand, while also meeting the need for resilience, inclusiveness and sustainability on the other. It will be important to look more closely at whether these twin aims are mutually compatible and reinforcing, whether a balance is needed between them, what actions can be taken which meet the needs of both, and what trade-offs this may involve.

50.   Providing for safe mobility is essential for recovery. The G20 Guidelines point to the need for an orderly removal of travel restrictions, guided by science, together with actions to build traveller confidence. Key actions identified include pursuing opportunities to agree common international approaches to COVID-19 testing and vaccination as the basis for enabling travel, and providing accessible, consistent, clear and updated information to travellers. The OECD is already working to support this international effort through its Blueprint for Safe International Travel, an initiative open to all countries which was endorsed by OECD Ministers at the OECD's Ministerial meeting on 31 May 2021.

51.   Policies and actions for recovery may also be directed at tourism enterprises, employees and stakeholders in the sector, through the provision of support programmes to help to retain them in business, strengthen their skills and diversify their appeal to new markets. In some circumstances opportunities

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[20] Analysing Megatrends to Better Shape the Future of Tourism, OECD, 2018

[21] Four future perspectives of the visitor economy after COVID-19, Postma, A., Heslinga, J., and Hartman, S., CELTH, 2021

[22] G20 Rome Guidelines for the Future of Tourism, OECD Report to G20 Working Group, OECD, 2021

might exist to make such support conditional on, or upgradable by, the meeting of sustainability standards, through policies agreed with the relevant industry bodies.

52.   Most countries have high level policies on sustainability, which may be linked to the 2030 Action for Sustainable Development and the 17 SDGs. These policies may support international commitments, for example to halt the loss of biodiversity and to limit global warming through transitioning to a decarbonised economy. Governments should be able to demonstrate how their tourism policies are in line with such sustainability policies and commitments. Tourism has the potential to play a significant role in delivering the SDGs and in finding synergies between socio-economic and environmental targets. In particular, tourism is directly included in SDGs on inclusive and sustainable economic growth, responsible consumption and production, and sustainable use of oceans and marine resources.

53.   An important issue to address is the positioning of tourism within policies and actions to combat climate change. The recently announced Glasgow Declaration aims to unite tourism stakeholders to secure strong actions and commitment to cut tourism emissions[23]. The COP26 programme will moreover include net-zero transport as a key focus area. Recent tourism trends can also play a positive role in a green transition. Increasing traveller concerns about environmental impacts and a heightened awareness of and interest in ecological values and natural heritage, which have become more apparent during the pandemic, can serve as a force for change.

54.   New technology can perform a crucial function in transitioning to more sustainable tourism, for example through the development of new fuel sources and processes and circular tourism business models. Digitalisation presents wide reaching opportunities in enhancing the visitor experience, enabling seamless and contactless interaction, facilitating better visitor management and allowing faster and more targeted communication of travel and tourism options. However, it needs to be driven and guided by policies which promote equity and inclusiveness, delivering benefit to micro and small businesses and local communities as well as to visitors. Issues of personal privacy, trust, data compatibility and interoperability of systems may need to be addressed by national and global policies and regulation.

55.   The issues outlined above point to the need for an integrated approach to tourism policy development and implementation, closely aligned with wider policy areas and involving a range of ministries and agencies whose remits have a bearing on tourism performance, resilience and sustainability. Crucially, effective mechanisms for engagement and partnership with the private sector and civil society will be essential. Consideration should be given to how this can be improved at a national and global level. The High Level Panel should also consider what policies are required to ensure and support the pursuit of new and improved data opportunities and statistical analysis, as addressed earlier in this session and throughout the Global Forum.

Topics for discussion

- What outlook for resilient, sustainable and inclusive tourism, and how can governments align policies and link recovery mechanisms to support this?

- What actions and priorities to safely restart travel and tourism, and boost recovery?

- What role for tourism in the transition to a decarbonised economy, and how can tourism policies align with policies and commitments on climate and other environmental challenges?

- What opportunities from digitalisation to support sustainable tourism development, and are stronger policy responses required to embrace this more widely?

- What role of data to support the tourism transformation agenda, and what policies and priorities to strengthen the tourism data infrastructure?

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[23] The Glasgow Declaration: a Commitment to a Decade of Tourism Climate Action, The One Planet Network, 2021