A blue economy for the sustainable development of the Mediterranean region: tourism and recreational activities

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OECD’s integrated approach to tourism

Measuring and comparing: Tourism Trends and Policies

- Tourism trade in value added indicators
- Tourism Satellite Account
- Global Forum on Tourism Statistics

Statistics & indicators

Cooperation & engagement

Policies & programmes

Analysing, and giving advice: Policy recommendations & support for tourism reforms

Whole of government approach: connecting with other policies and industry

- Partner countries (Colombia, Costa Rica, Croatia, Egypt, Lithuania, Morocco, Romania, Russia and South Africa)
- Multi-stakeholder involvement (business and industry associations, universities, economic institutes)
- International organisations (e.g. EC, APEC, UNWTO, ILO, UNEP, UNESCO, World Bank)

Policy analysis (investment, megatrends, sustainability, tourism trade, sharing economy, transport, SMEs, skills)

National tourism review (Mexico, Italy)

Local tourism reviews and thematic reviews (culture, creative tourism, food)
OECD work on tourism for 2017-18

- OECD Tourism Trends and Policies 2018
- Measuring performance in tourism
- Analysing megatrends to better shape the future of tourism
- Analysing investment trends in tourism for effective policy responses
- Providing new evidence on value of trade in tourism services
- Tourism policy reviews – national, local, thematic
For tourism, business as usual is not an option

- Necessity to cope with the rapid tourism growth in the years to come, and making it more inclusive and sustainable
- Adapting the traditional tourism business models
- Managing tourism mobility at the destination
- Adapting to climate change and mitigating the tourism impacts
- Improving the governance of tourism in complex environments with multiple stakeholders
- Supporting skills development to support an innovative, sustainable and inclusive tourism economy
The global tourism market

% exports

€1 Value Added in tourism results in 56c VA in upstream industries

OECD area

4% direct GDP

54% international tourist arrivals

21% service exports

6% employment

77% domestic consumption

Sources: OECD Tourism Trends and Policies 2016, OECD-WTO Trade in Value Added (TiVA)
Mediterranean countries

Ocean industries value added

Source: The Ocean Economy in 2030, OECD report
Ocean economy

- Ocean economy represents 2.5% of world GVA (1.5 trillion USD)
- Marine and coastal tourism 26% of total Value Added of the ocean economy
- Marine and coastal tourism is 2nd largest employer with 7 million jobs (direct Full Time Equivalent)

Source: The Ocean Economy in 2030, OECD report.
Forecasts by 2030

Tourism economy
✓ Globally, 1.8 billion international tourist arrivals forecast by 2030

Ocean economy
✓ Ocean economy GVA triple
  – 1.5 trillion USD to almost 3 trillion USD
✓ Marine and coastal GVA double
  – 390 million USD to almost 780 million USD
  – Share stable at 26% of the ocean economy VA
✓ Marine and coastal employment +22%
  – 7 million to 8.5 million jobs
  – 2nd larger employer

Case study - Developing coastal tourism – The Wild Atlantic Way (Ireland)

✓ Ireland's first long-distance touring route, the Wild Atlantic Way stretches along the Atlantic coast from Donegal to West Cork
✓ One of Fáilte Ireland’s signature projects to rejuvenate Irish tourism
✓ Once fully realised it will:
  ✓ assist in increasing visitor numbers, dwell time, spend and satisfaction along all parts of the route;
  ✓ direct visitors to less-visited areas along the coast;
  ✓ re-package the Atlantic seaboard as a destination to overseas and domestic visitors;
  ✓ improve linkages between, and add value to, a range of attractions and activities;
  ✓ build on the work completed in these areas already and assist businesses, agencies, local groups and other stakeholders along the area to work together.
Case study - Jeju Olle Walking Trail (Korea)

✓ Inspired by the Route of Santiago de Compostela in 2007
  ✓ Jeju is the largest island off the coast of the Korean Peninsula
  ✓ 21 main routes, 5 sub-routes and all together 422 km
  ✓ Visitor numbers increased from only 3,000 in 2007 to nearly 1.2 million by 2014

✓ It is designed to connect tourists with residents and regional culture and landscapes
  ✓ Olle means a narrow pathway connecting the street to the front gate of a house
  ✓ It passes through small villages and natural beauty of Jeju (oceans, 368 small inactive volcanoes, stone walls and forests)

✓ Offers a potential form of more sustainable tourism for traditional sun and beach destinations
  ✓ Encourages people to stay longer and local in a sustainable way and to revisit to walk whole routes
  ✓ Many small accommodation establishment and shops created along the trail, resulting in the rejuvenation of many small villages
Case study - Marine Park Environmental Management Charge (Australia)

✓ The Great Barrier Reef Marine Park Environmental Management Charge (EMC) was introduced in 1993

✓ Charges are either:
  ✓ Per visitor – and passed on by the operator to the Great Barrier Reef Marine Park Authority (GBRMPA)
  ✓ Fixed quarterly – for operations involving the installation and operation of tourist facilities, underwater observatories, hire of equipment, vending operations etc.

✓ All EMC payments are applied directly to the management of the Park (e.g. education, research, site planning, information signs)

✓ Most commercial activities require a permit issued by GBRMPA. The permit system:
  ✓ assists the GBRMPA to reduce impacts on high use and/or sensitive areas, separate potentially conflicting activities, and encourage responsible behaviour
  ✓ offers benefits to accredited tourism operators, such as longer permit terms, resulting in improved quality of visitor experience
Case study - Integrated governance to spread the benefits of the cruise industry (Germany)

- Hamburg Cruise Center (HCC) emerged in 1998 with 12 members including shipping lines, port companies, catering enterprises and hotels

- Now with over 100 members, HCC brings together actors that might gain from cruise activity and is recognised as “best practice” for destination marketing in the cruise industry

- Governed by a wide range of actors facilitating a coherent cruise development strategy, enabling HCC to boost cruise tourism demand and increase the benefits generated in the city

- Executive board is composed of leaders from cruise lines (TUI Cruise and Aida Cruises), from ports and logistics services (HHLA), from the Hamburg Chamber of Commerce and city planning

- Passenger numbers have grown from 20,000 passengers in 2000 to 600,000 in 2014, of which 95% are turnaround calls and 5% transit calls
Project STRATUS (Environmental Strategies for Sustainable Tourism), launched in 2017, aims at transforming the protected maritime area of Capo Carbonara (Villasimius) in a laboratory for sustainable tourism.

Its objectives are to:
- Foster competitiveness of local tourism SMEs
- Improve the sustainability of coastal tourism through technological innovations
- Improve planning and managing skills of local public administrations and SMEs through a participative approach

The projects will build up on local stakeholders and it will also envisage the creation of a common brand/certification to promote eco-tourism products.

It has been created by a partnership between University of Cagliari, Capo Carbonara maritime area, with the participation of Italian and French enterprises and associations.
Supporting effective policies for tourism growth – policy considerations

✓ Implement institutional arrangements to establish and leverage policy synergies and develop an integrated approach to tourism
✓ Better understand the unique inter-linkages, synergies and trade-offs between tourism and related policy areas
✓ Evaluate the costs and benefits of policy options from both a short-term and long-term perspective
✓ Develop timely, consistent, comparable and specific data to inform the development of evidence-based tourism policy, and evaluate performance and effectiveness
✓ Better understand tourism’s current and potential impacts on natural resources
✓ Provide an environment to support the creation and growth of small-scale businesses
✓ Promote innovative solutions and good practices
The Green Growth and Sustainable Development Forum “Greening the Ocean Economy” will be held in Paris on 21-22 November 2017. It will focus on:

- Investment, innovation and employment aspects of the fast-growing ocean-based industries;
- Exploring how economic development and conservation needs can be balanced successfully through innovations in established and emerging ocean industries, as well as marine spatial planning instruments;
- The role of science and technology, responsible business conduct and waste management.

A panel discussion on the Ocean Economy, Green Growth and Tourism will be one of four parallel sessions held on 21 November (16:30-18:00)

For additional information see http://www.oecd.org/greengrowth/ggsd-forum.htm
Publications available on-line

- A review of the policy framework for tourism marketing and promotion (2017)
- Major events as catalysts for tourism (2017)
- Financing approaches for tourism SMEs and entrepreneurs (2017)
- Intermodal Connectivity for Destinations (2016)
- Statistical Initiatives Measuring Tourism at Subnational Level (2016)

To find out more -

www.oecd.org/cfe/tourism
http://stats.oecd.org/