

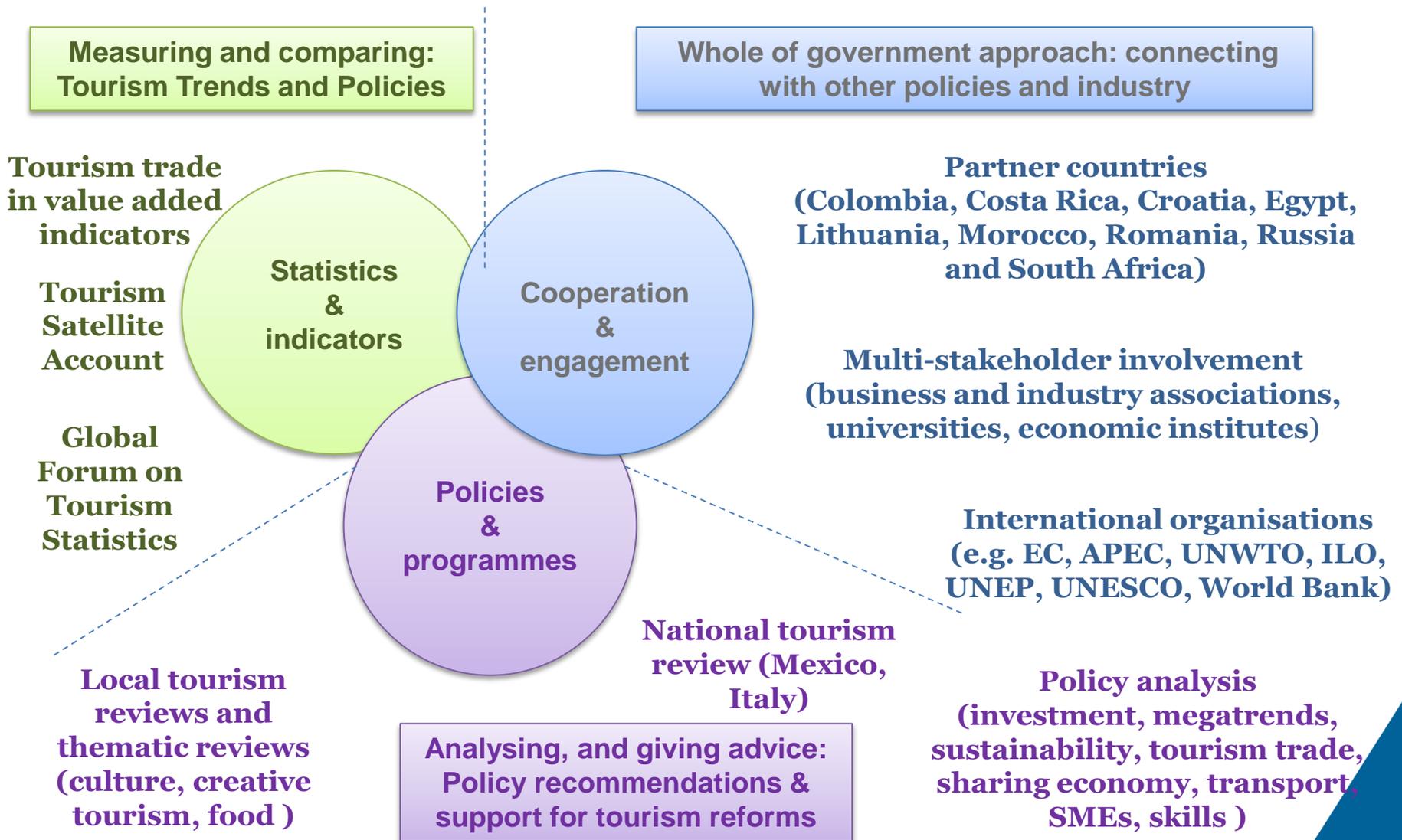


A blue economy for the sustainable development of the Mediterranean region: tourism and recreational activities

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OECD's integrated approach to tourism





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

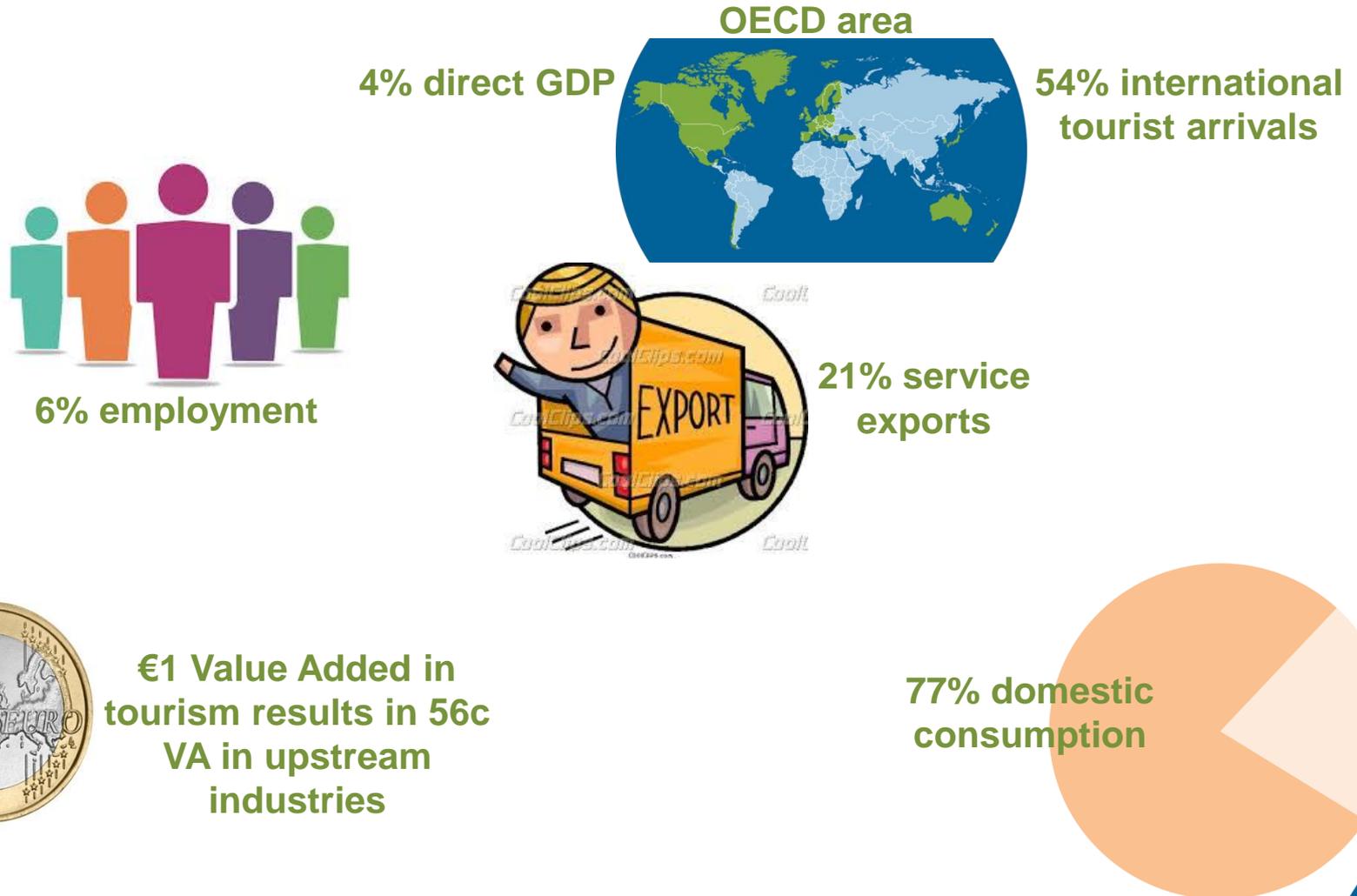


For tourism, business as usual is not an option

- 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

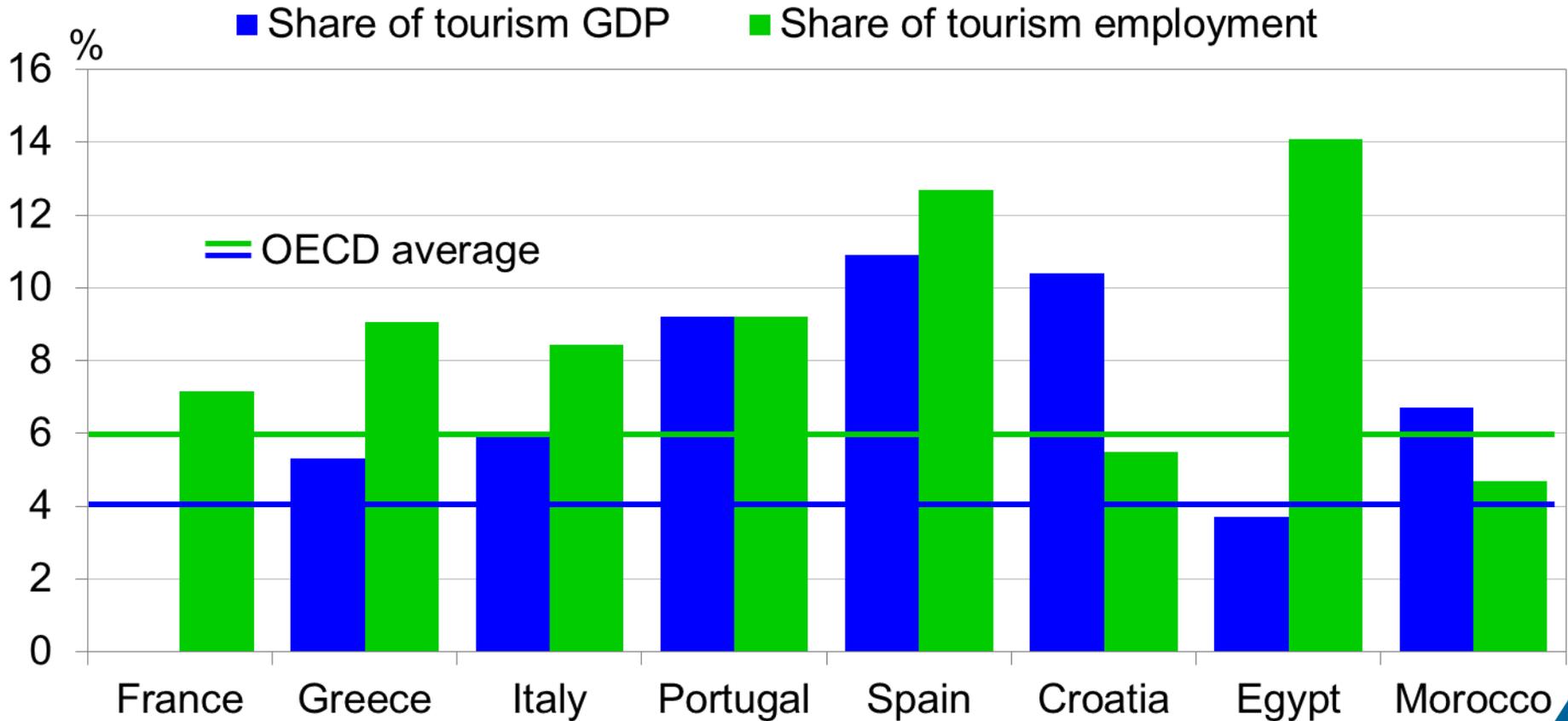


The global tourism market



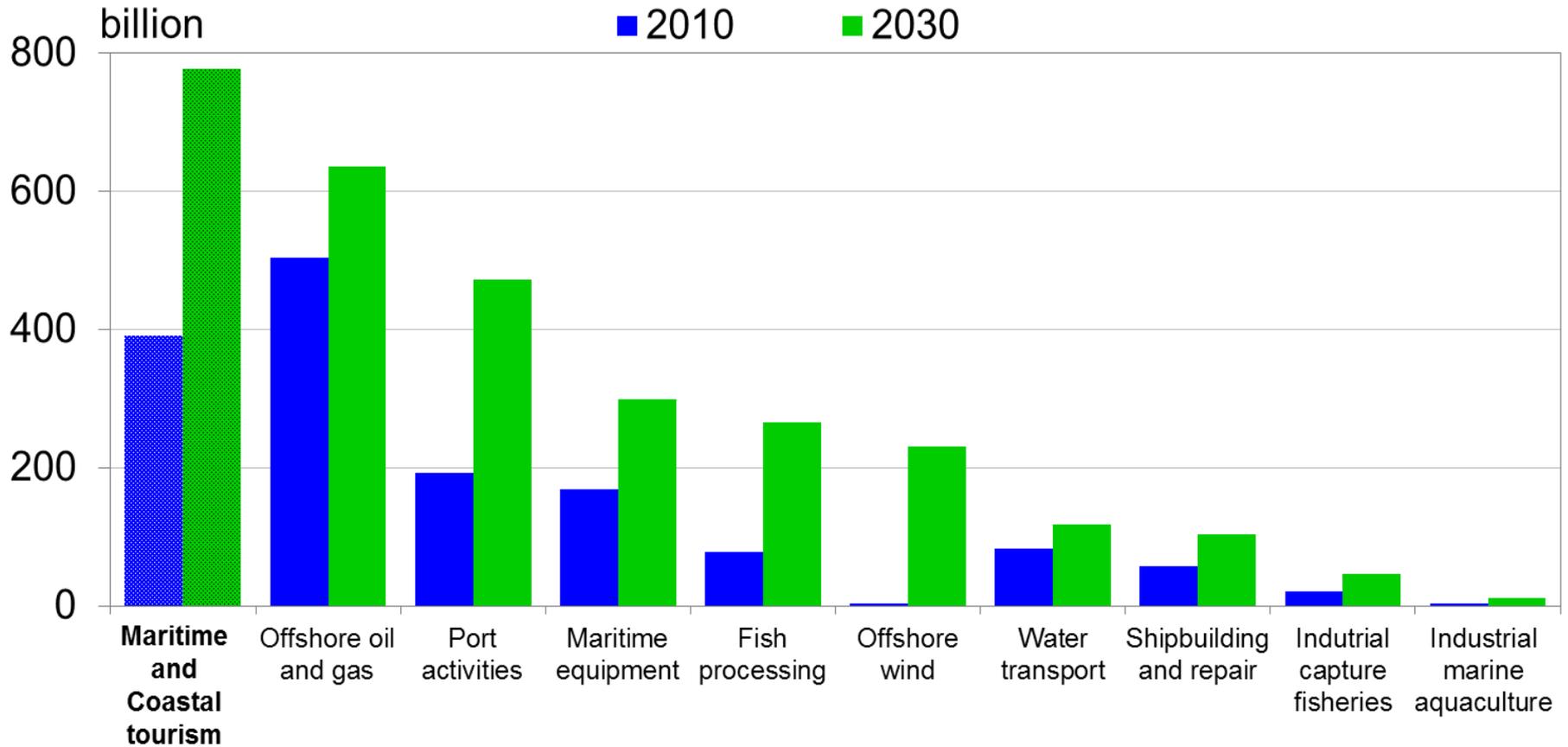


Mediterranean countries





Ocean industries value added





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 larger employer with 7 million jobs (direct Full Time Equivalent)



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



Case Study- Sustainable Tourism in Sardinia (Italy)

- ✓ 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



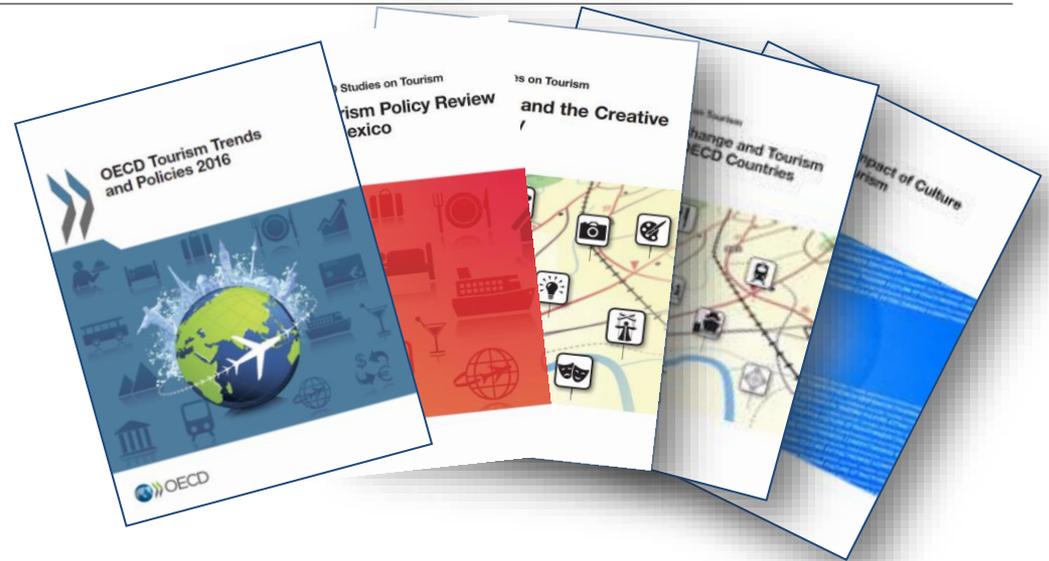
2017 OECD Green Growth and Sustainable Development Forum

- ✓ 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>



To find out more -

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



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)
- OECD Tourism Policy Review of Mexico (2017)
- Tourism Trends & Policies (2008, 2010, 2012, 2014, 2016)
- Intermodal Connectivity for Destinations (2016)
- Statistical Initiatives Measuring Tourism at Subnational Level (2016)