



# *REBUILDING TOURISM FOR THE FUTURE – AN OECD PERSPECTIVE ON POLICIES TO NAVIGATE THE RECOVERY*

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#OECDTourism

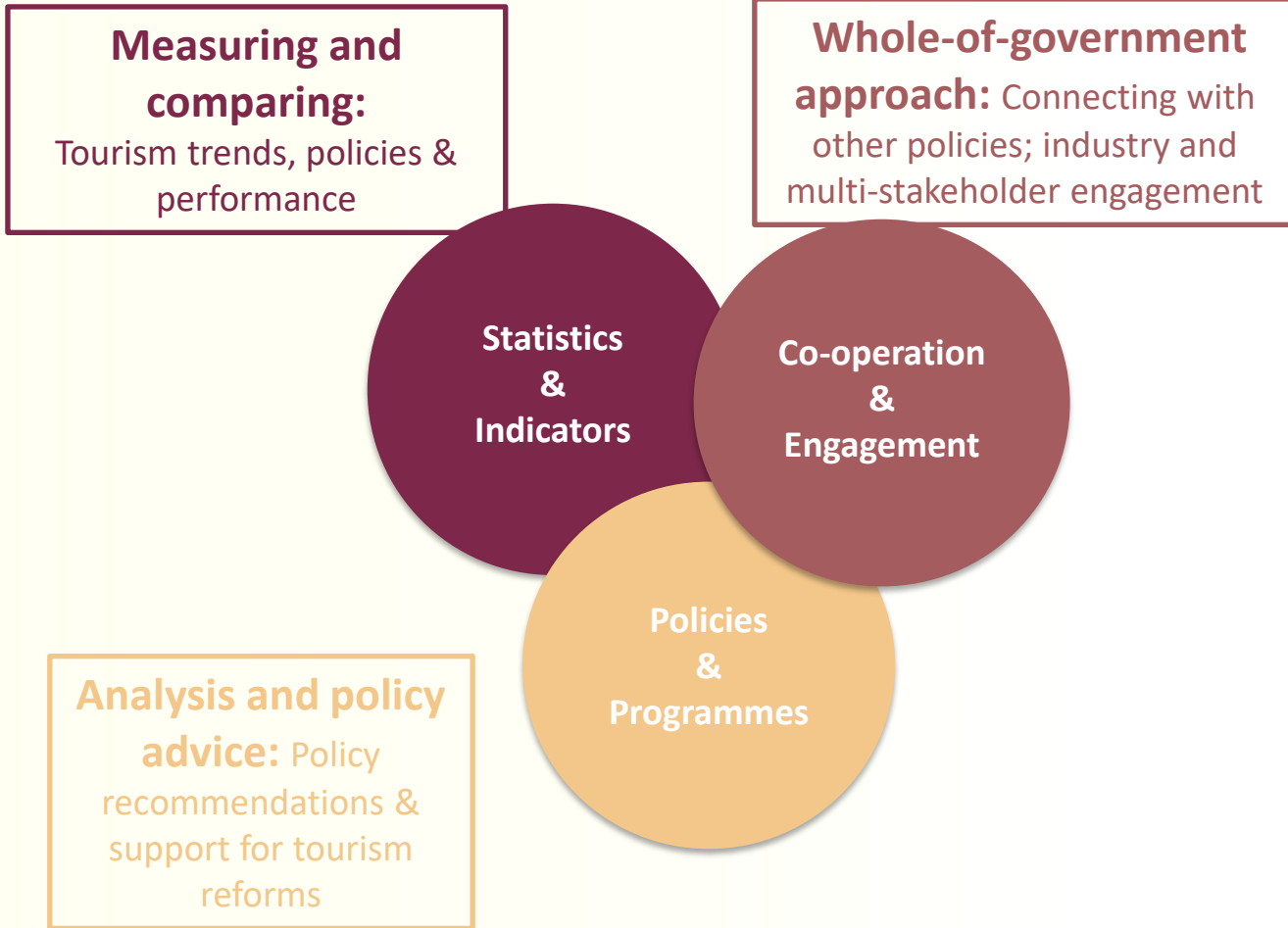
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# OECD's integrated approach to tourism





# COVID-19 crisis has hit the tourism economy hard ...

## RECOVERY OUTLOOK UNCERTAIN

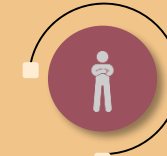
**International tourism fell by around 75% in 2020** – and the sector remains in survival mode with recovery expected to be protracted

Vaccines boosted early hopes for recovery in 2021 - but **challenges remain**, including new variants of concern and vaccine roll out

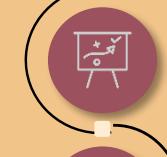
Recovery depends on **interlinked consequences of economic and health crisis** on demand and supply-side factors

## KEY POLICY PRIORITIES

Restore traveller confidence



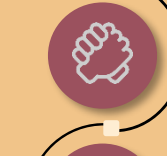
Sustain domestic tourism



Support safe return of international tourism



Evolve response measures and address gaps



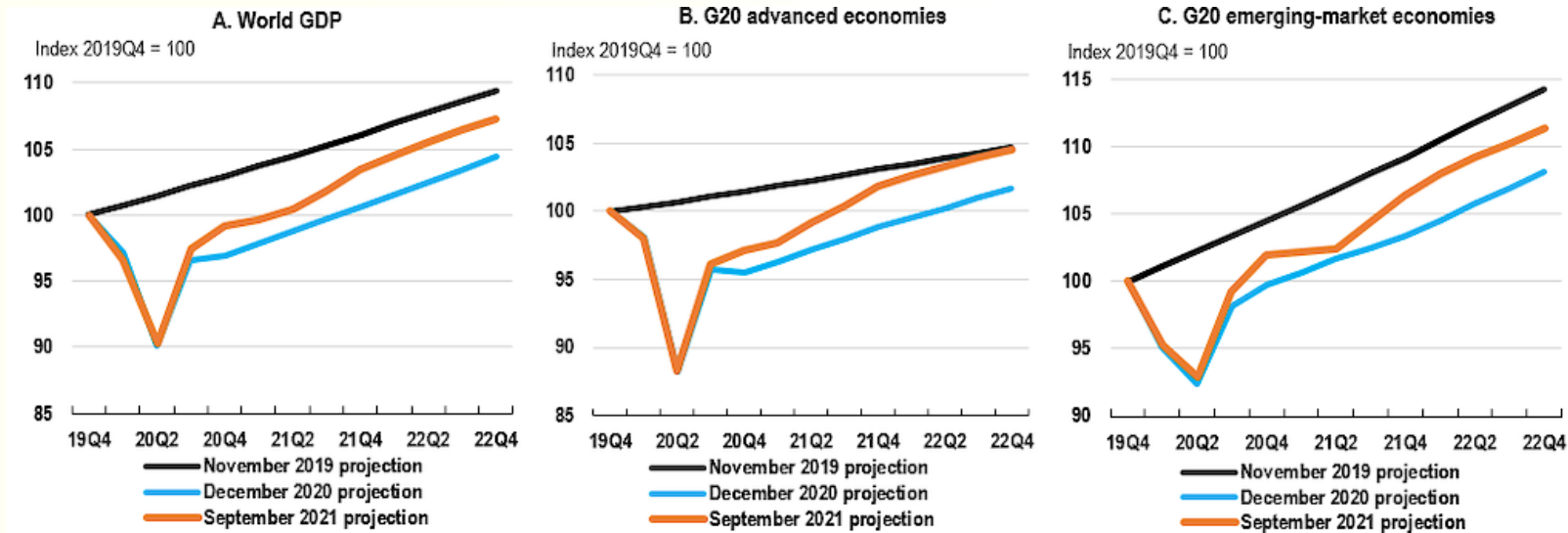
Support tourism businesses to adapt and survive

Provide clear information and limit uncertainty (to extent possible)

Already start to build toward more resilient, sustainable tourism



# ... with significant knock-on impacts on the wider economy ...

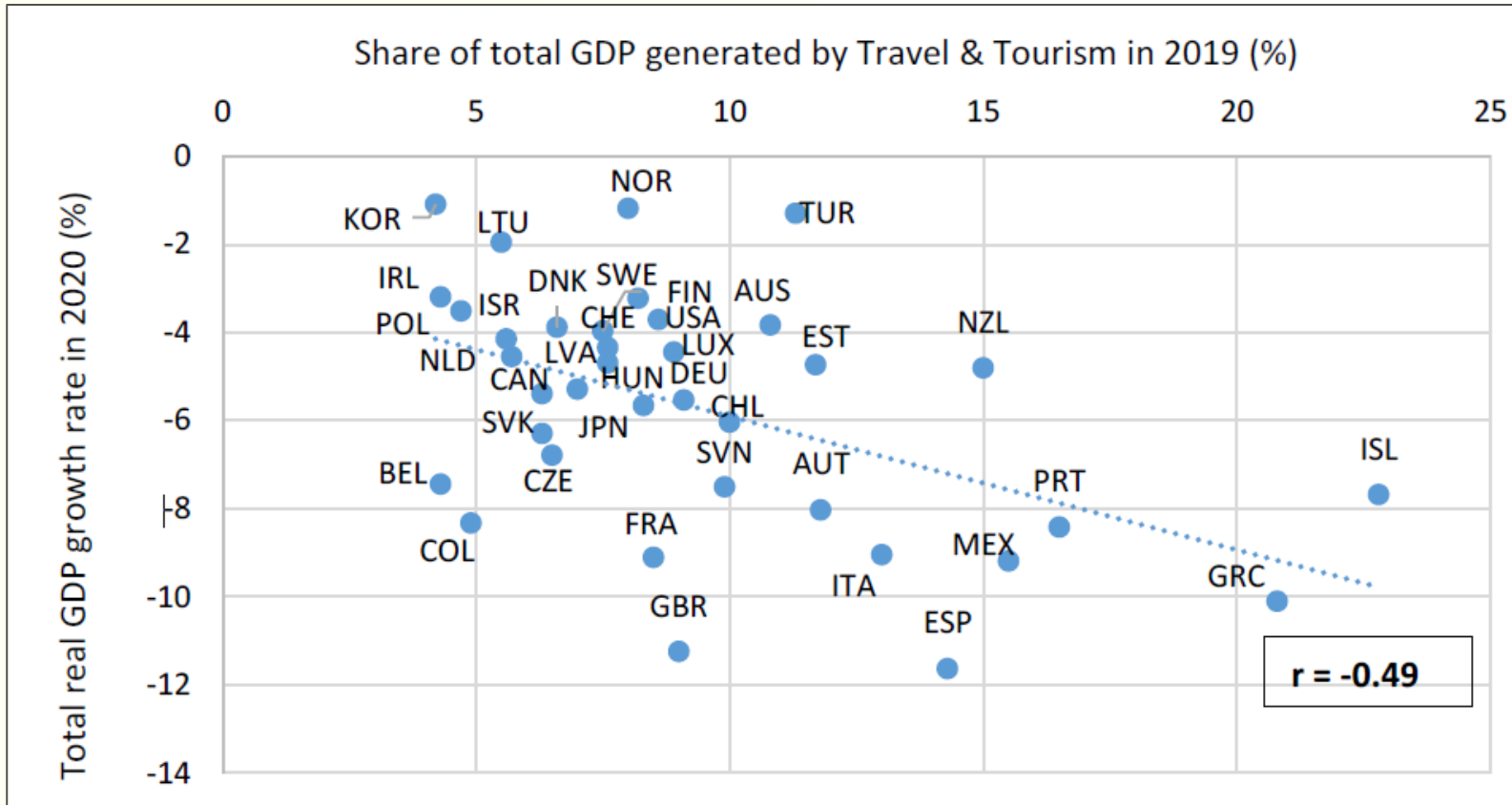


- Global GDP has now returned to pre-pandemic levels, but output and employment gaps remain in many countries, where vaccination rates are low
- Countries where tourism is a big part of the economy have been particularly hard hit – with adverse macro-economic effects

Source: OECD Economic Outlook, Preliminary Report Sep 2021



# ... countries where tourism is significant part of economy are most impacted ...



- Dependency on tourism pre-crisis better explains **GDP impacts** in 2020, than any other affected sector or stringency of lockdown measures
- Tourism has been slower than other sectors to bounce back – and this is **impacting recovery** in many countries

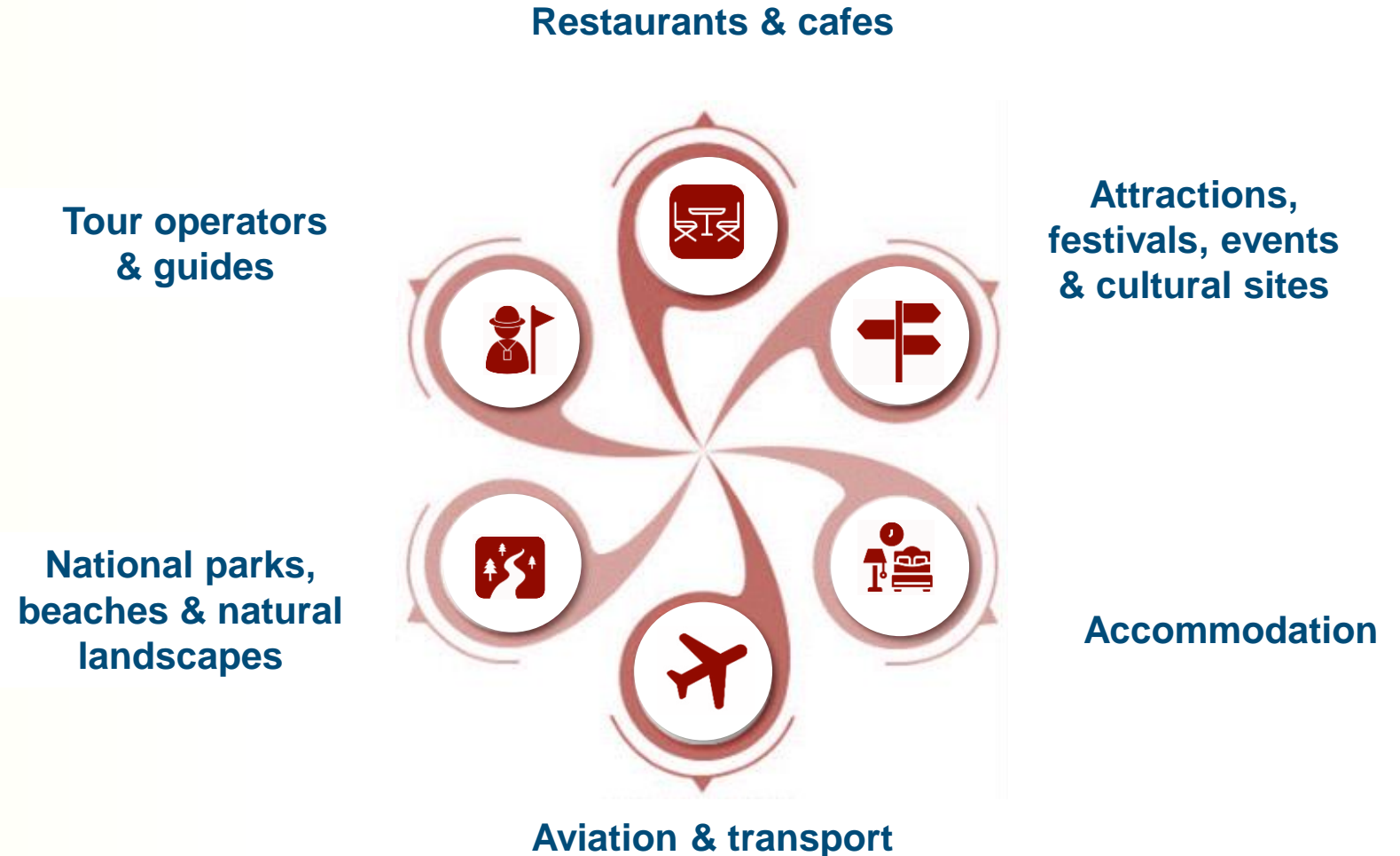
Note: Correlation coefficient computed on a sample of 37 OECD countries.  
Source: OECD Economic Outlook December 2020 database and WTTC data



# ... and this impact is being felt through the entire tourism ecosystem

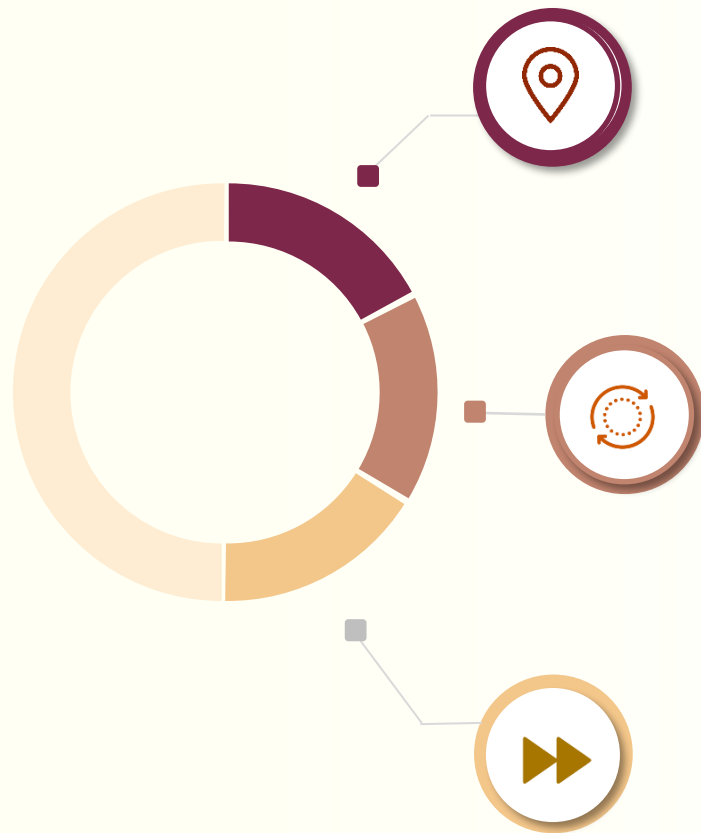
Putting at risk the survival of many tourism businesses, particularly SMEs that are heavily dependent on other businesses in the tourism ecosystem

Recovery will vary from place to place, as some destinations are more exposed than others





# Tourism is benefiting hugely from support packages and recovery plans ...



**Mitigating impact and supporting people and businesses, particularly SMEs**

Protecting tourists  
Supporting jobs and workers  
Supporting business survival

**Managing the restart and promoting recovery of travel and tourism**

Promoting co-ordinated action  
Lifting travel restrictions  
Reactivating, adapting business  
Building traveller confidence

**Tackling the consequences and preparing for the future**

Pivoting to new markets  
Tourism recovery strategies  
Destination development plans



# ... we need to take the opportunity to rethink and transform tourism for the future

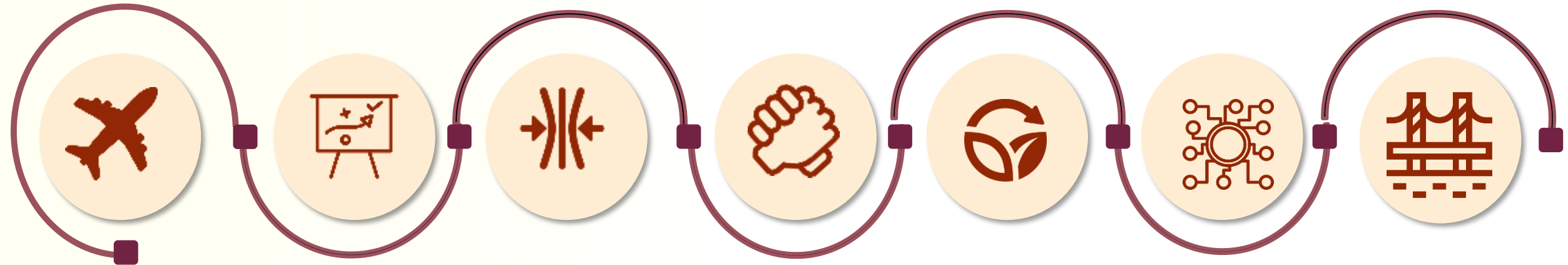
## G20 Rome Guidelines for the future of tourism

**Safe mobility:**  
Restore traveller confidence

**Resilience:** securing a robust and stable tourism sector in uncertain times

**Green transformation:**  
managing tourism to sustain global and local environments

**Investment & infrastructure:**  
focusing resources on a sustainable future for tourism



**Crisis management:** minimising the impact of future crises affecting tourism

**Inclusiveness:** widening community engagement and benefits from tourism

**Digital transition:** enabling all tourism stakeholders to benefit fully from digital opportunities





# Global Forum on Tourism Statistics, Knowledge and Policies, 2-5 November 2021 | Seoul, Korea

**RESHAPING  
TOURISM FOR A  
MORE RESILIENT  
AND  
SUSTAINABLE  
TOMORROW**



**Learning the lessons to prepare for future shocks:**  
preparedness, crisis management, multi-level governance and co-ordination mechanisms, strong collaboration public-private sectors



**Shaping the recovery to support people, businesses and places:** protecting consumers, health and safety, innovative business models, changes in travel behaviour



**Building a greener, more resilient tourism economy:**  
seasonality, tourism over dependence, low carbon, connectivity



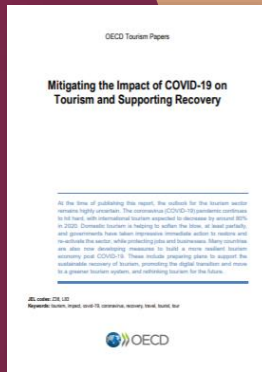
**Towards a new future for tourism:**

rethink the tourism system, digital transition, sustainability, the future of work, strategic foresight, data-driven

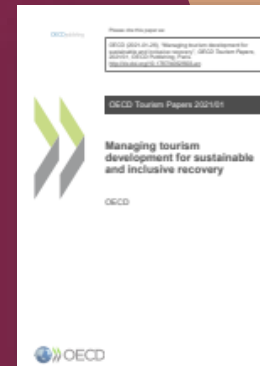
PLATFORM FOR ENGAGEMENT WITH PRIVATE SECTOR, ACADEMIA AND CIVIL SOCIETY



# Find out more – [oecd.org/cfe/tourism/](https://oecd.org/cfe/tourism/)



Mitigating the impact of COVID-19 on Tourism and Supporting Recovery



Managing Tourism Development for Sustainable and Inclusive Recovery



Preparing the tourism workforce for the digital future



G20 Rome Guidelines on the Future of Tourism

# Thank you!

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