

ANNEX 3.A1

Annex Table 3.A1. **National tourism administration and related websites**

OECD member countries		
Australia	Department of Industry, Tourism and Resources	www.industry.gov.au
	Australian Bureau of Statistics	www.abs.gov.au
	Australian Tourism Export Council	www.atec.net.au
	Ecotourism Australia	www.ecotourism.org.au
	Quality Tourism	www.qualitytourism.com.au
	Tourism and Transport Forum	www.ttf.org.au
	Tourism Australia	www.tourism.australia.com
Austria	Federal Ministry of Economics and Labour	www.bmwa.gv.at
	Austrian Federal Economic Chamber	www.wko.at
	Austrian National Tourist Office	www.austria.info
	Statistics Austria	www.statistik.at
	Tourism Studies	www.studien.at
Belgium	Ministry for Administrative Affairs, Foreign Policy, Media and Tourism of the Flemish region	www.flanders.be
	Ministry of Agriculture, Rural affairs, Environment and Tourism of the Walloon region Commissariat Général au Tourisme	www.commissariat.tourisme.wallonie.be
	Tourism Promotion Office of Flanders	www.visitflanders.com
	Tourism Promotion Office of Walloon and Brussels	www.opt.be
Canada	Federal Ministry of Industry	www.ic.gc.ca
	Canadian Tourism Commission	www.canadatourism.com
Czech Republic	Ministry for Regional Development	www.mmr.cz
	Czech National Tourism Board	www.czechtourism.com
	Czech Statistical Office	www.czso.cz
Denmark	Ministry of Economic and Business Affairs	www.oem.dk
	Official tourism website of Denmark	www.visitdenmark.com
Finland	Ministry of Trade and Industry	www.ktm.fi
	Finnish Tourist Board	www.mek.fi
France	Ministry of Economy, Finance and Employment	www.minefe.gouv.fr
	Official Tourism website of France	www.tourisme.gouv.fr
	French government tourist office	www.franceguide.com
Germany	Federal Ministry of Economics and Technology	www.bmwi.bund.de
	Official tourism website of Germany	www.germany-tourism.de
Greece	Ministry of Tourism	www.mintour.gr
	Greek National Tourism Organisation	www.gnto.gr
	Organisation of Tourism Education and Training	www.otek.edu.gr
	Tourism Development Co.	www.tourism-development.gr
Hungary	Ministry of Local Government and Regional Development	www.meh.hu
	Official tourism website of Hungary	www.hungary.com

Annex Table 3.A1. **National tourism administration and related websites** (cont.)

Iceland	Ministry of Communications	http://eng.samgonguraduneyti.is
	Central Bank of Iceland	www.sedlanbanki.is
	Icelandic Tourist Board	www.visiticeland.com
	Statistics Iceland	www.statice.is
Ireland	Department of Art, Sport and Tourism	www.dast.gov.ie
	Irish Tourist Industry Confederation	www.itic.ie
	National Tourism Development Authority	www.failteireland.ie
	Tourism Ireland	www.tourismireland.com
Italy	Presidency of the Council of Ministers	www.governo.it
	Italian National Tourism Board	www.enit.it
Japan	Ministry of Land, Infrastructure and Transport	www.mlit.go.jp
	Japan National Tourist Organisation	www.jnto.go.jp
Korea	Ministry of Culture and Tourism	www.mct.go.kr
	Korea Association of Travel Agents	www.kata.or.kr
	Korea Culture and Tourism Institute	www.kcti.re.kr
	Korea Tourism Organisation	www.knto.or.kr
	Main tourism websites	www.etourkorea.com www.tour2korea.com
	Tourism Knowledge Information System	www.tour.go.kr
Luxembourg	Ministry for the Middle Classes, Tourism and Housing	www.mdt.public.lu
Mexico	Ministry of Tourism	www.sectur.gob.mx
Netherlands	Ministry of Economic Affairs	www.minez.nl
	Netherlands Board of Tourism and Conventions	www.holland.com
New Zealand	Ministry of Tourism	www.tourism.govt.nz
	New Zealand's official tourism dataset	www.tourismresearch.govt.nz
	Statistics New Zealand	www.stats.govt.nz
	Tourism Industry Association	www.tianz.org.nz
	Tourism New Zealand	www.newzealand.com
	Tourism New Zealand's corporate website	www.tourismnewzealand.com
Norway	Ministry of Trade and Industry	www.regjeringen.no
	Official travel guide to Norway	www.visitnorway.com
Poland	Ministry of Sport and Tourism	www.msport.gov.pl
	Central Statistical Office	www.stat.gov.pl
	Institute of Tourism	www.intur.com.pl
	Polish Tourist Organisation	www.pot.gov.pl
Portugal	Ministry of Economy and Innovation	www.min-economia.pt
	Turismo de Portugal	www.turismodeportugal.pt
Slovak Republic	Ministry of Economy	www.economy.gov.sk
	Slovak Tourist Board	www.slovakiatourism.sk
	Statistical Office of the Slovak Republic	www.statistics.sk
Spain	Ministry for Industry, Tourism and Commerce	www.mityc.es
	Official tourism website of Spain	www.tourspain.es
	Turismo 2020	www.turismo2020.es
Sweden	Ministry of Enterprise, Energy and Communications	www.sweden.gov.se
	Agency for Economic and Regional Growth	www.nutek.se
Switzerland	State Secretariat for Economic Affairs	www.seco.admin.ch
	Swiss National Tourism Board	www.myswitzerland.com
Turkey	Ministry of Culture and Tourism	www.kultur.gov.tr
	Official tourism website of Turkey	www.tourismturkey.org
United Kingdom	Department for Culture, Media and Sport	www.culture.gov.uk
	Official tourism website of Britain	www.visitbritain.com
	Official tourism website of England	www.enjoyengland.com
	Official tourism website of London	www.visitlondon.com
	Official tourism website of Scotland	www.visitscotland.com
	Official tourism website of Wales	www.visitwales.com
United States	Department of Commerce	www.commerce.gov
	Office of Travel and Tourism Industries	www.tinet.ita.doc.gov

Annex Table 3.A1. **National tourism administration and related websites** (cont.)

OECD non-member countries		
Romania	Ministry of SMEs, Trade, Tourism and Liberal Professions	www.mimmctpl.ro
	Official tourism website of Romania	www.romaniatravel.com
South Africa	Department of Environmental Affairs and Tourism	www.deat.gov.za
	Official tourism website of South Africa	www.southafrica.net
	Statistics South Africa	www.statssa.gov.za
	Tourism Business Council of South Africa	www.tbcsa.travel

Synthesis

The following chapter presents summary details of the tourism sector in 32 countries, 30 of which are OECD members, in addition to Romania and South Africa. Each country section is set out under five main headings:

- Tourism in the economy.
- Tourism organisation.
- Tourism budget.
- Tourism related policies and programmes.
- Statistical profile

For further information, a synopsis table in Annex 3.A1 indicates the main websites for national tourism administrations, national tourism organisations and other important Tourism related organisations.

This chapter focuses mainly on international tourism (inbound and outbound). It also includes some partial data on domestic tourism based on Tourism Satellite Account sources or on national surveys. The measurement of domestic tourism, in terms of the number of tourist trips taken each year, is not generally provided by most countries on a consistent basis and does not readily lend itself to aggregations and international comparisons.

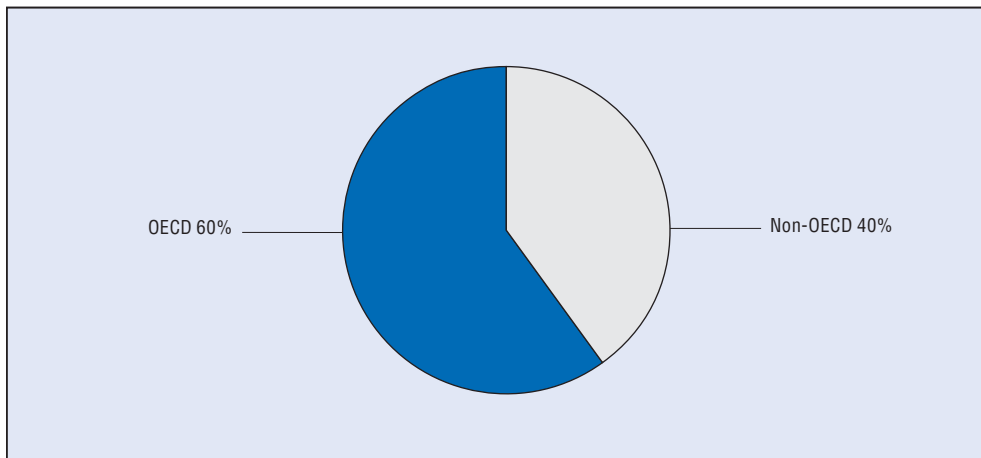
International tourist arrivals, however, are recorded for almost all countries. Data for 2005, the latest year for which complete data are available, show that globally there were 802 million international tourist arrivals (World Tourism Organisation). In the OECD member countries, international tourist arrivals in that year totalled 481.5 million, and thus these countries account for 60.0% of all international tourism by this measure (Figure 3.1).

Eight out of the top ten international tourism destinations are included in this chapter, the exceptions being China and Russia. These eight – France, Spain, USA, Italy, UK, Germany, Mexico and Austria – together accounted for 308.9 million arrivals in 2005, 38.5% of the global total.

Tourism in the economy

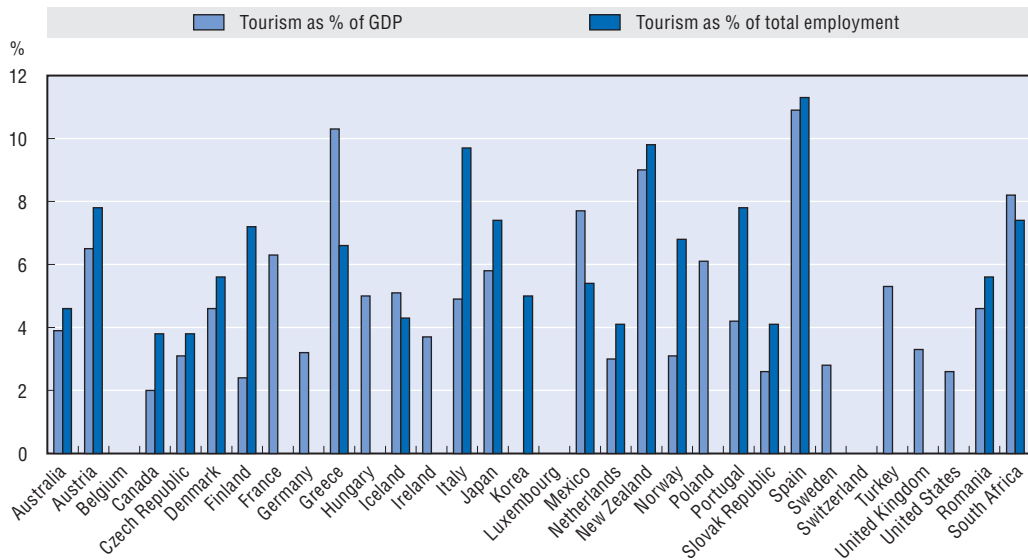
The importance of the tourism sector in the economies of these 32 countries varies widely. To generalise however, tourism accounts for an important share of Gross Domestic Product (GDP) and of services exports in many countries (see Chapter 1, *New Paradigm for International Tourism Policy*), and also generates a substantial share of total employment. Although data coverage of these measures is variable (see individual sections for country details), an idea of tourism's economic importance is given in the Figure 3.2.

Figure 3.1. **International tourist arrivals, world, 2005**



StatLink <http://dx.doi.org/10.1787/153030008744>

Figure 3.2. **Tourism in the economy, 2006**



StatLink <http://dx.doi.org/10.1787/152847245261>

Clearly tourism is an important economic force in many of the countries covered here. For some of the world’s major tourism destinations, tourism plays a crucial role in sustaining employment and in earning foreign currency receipts.

Tourism organisation

The treatment of the tourism sector within the government structures of the countries covered in this chapter varies considerably. Moreover, due to variations in government structures it is difficult to be precise about which portfolio includes tourism. However, the growing economic and political importance of tourism is reflected by the fact that 15 OECD countries have a Ministry or a Secretariat of State with Tourism named in their title.

Several countries have their own dedicated tourism ministries (Greece, Mexico and New Zealand), however in most cases, the tourism portfolio is attached to Economy,

Industry, Trade or SME ministries (Australia, Austria, Canada, Denmark, Finland, France, Germany, Netherlands, Norway, Portugal, Romania, Slovak Republic, Spain, Sweden, Switzerland and United States). For a few others, the tourism portfolio is linked to Regional Development (Czech Republic and Hungary), Culture and Sports (Ireland, Korea, Poland, Turkey and United Kingdom), Environment (South Africa) or Transportation (Japan).

Tourism budgets

A comparison of tourism budgets is complicated by issues of exchange rates and, especially, of the different approaches to the public funding of tourism support adopted by governments. Readers are referred to the country sections for details.

As a generalisation, however, the largest item in public budgetary support for tourism tends to be the marketing budgets granted to national tourist offices or their equivalents for international marketing purposes. Again as a generalisation, it is typically the national tourist office that is responsible for marketing the country as a tourism destination to foreign visitors. Regions or specific destinations within countries are then responsible for their own promotion within the country concerned, but generally national governments discourage regions from direct (and usually costly) international marketing themselves. In some countries, such as the United States for example, where it is felt that the country's international profile is inherently high, international marketing budgets are limited.

For domestic tourism, countries are becoming increasingly aware of the economic benefits to be gained from encouraging nationals to take their holidays in their own countries, both in terms of balance of payments benefits (by avoiding expenditure on holidays abroad) and in terms of the economic stimulation that a vigorous domestic tourism sector can generate. As a result, national tourist offices or other public tourism organisations are taking on more responsibility for the active promotion of tourism opportunities within their own countries to their resident population.

Tourism related policies and programmes

Public investment in tourism is again highly varied across countries, and the reader is referred to the country sections for detailed information.

As an economic activity with the potential to create jobs, add value and earn foreign exchange, tourism is increasingly being seen as a sector in which public investment can be justified, in a number of areas. The most common are:

- Investment programmes in infrastructure which can contribute to facilitating access to the tourism industry for nationals and foreigners alike.
- Programmes supporting the small business sector which, in terms of the number of enterprises engaged, is dominated by SMEs; programmes to enhance quality in tourism most commonly through action of training.
- Programmes aimed at the quality of tourism facilities and services (these often involve the introduction and maintenance of national quality standards and quality accreditation schemes).
- Licensing schemes for personnel engaged in tourism (e.g. the licensing of tourism guides).
- The creation of a business and investment climate that is supportive of the tourism sector and which encourages the participation of the private sector as prime investors.

Governments are also increasingly conscious of their role in facilitating international access for visitors to their countries by means of the pursuit of increasingly liberal air transport policies. In the area of environmental policy and conservation, governments are also becoming more directly involved in the promotion of ecologically-friendly policies aimed at minimising the adverse impact of tourism on the physical environment and maximising the sustainability of their tourism sectors.

The concept of public-private partnerships in tourism is being pursued actively by a number of countries, both in the financing of national tourist offices and the development of tourism networks such as those providing information to tourists at a local level, as well as investment programmes geared to leveraging private investment in the tourism sector by means of public pump-priming money.

Policy advice and enabling measures are also increasing, led by national governments, to assist tourism industries and especially small businesses to meet the fast-growing competition in global tourism. A notable emphasis is now being seen on maximising the use of on-line technologies to enable tourism businesses to benefit from and cope with the rapid globalisation of tourism marketplaces and of tourism marketing. Information and reservation systems are at the heart of many of these initiatives, as the direct linkages via the Internet between the tourist and the tourism service supplier strengthen and disintermediation (the elimination of the need for the use of travel intermediaries such as travel agents) increases.

Finally, in addition to the pursuit of national policies and programmes and the promotion of tourism clusters and networks, governments are becoming increasingly aware of the potential benefits to be gained from international co-operation in tourism marketing and promotion and generally take the lead in developing tourism linkages with other, often contiguous, states.

Summary

To summarise, tourism is gaining in importance in the eyes of governments as an economic activity which justifies serious consideration at the level of national policy. Tourism in many countries has already surpassed in economic importance some of the more traditional sectors such as agriculture which historically have commanded greater political attention at national government level. Governments are becoming more aware of the benefits and of the potential pitfalls of the tourism sector in national economic development terms. Closer study of this chapter will illustrate the many initiatives taken by governments in the tourism field and will assist the reader in comparing their own national experience with international best practice.

Basic methodological references

The following definitions are based on UN and UNWTO (1994), International Recommendations on Tourism Statistics (IRTS), UN, Madrid and New York.

Inbound tourism

Arrivals associated to inbound tourism correspond to those arrivals by international (or non-resident) visitors within the economic territory of the country of reference.

Visitors include: a) *Tourists (overnight visitors)*: “a visitor who stays at least one night in a collective or private accommodation in the country visited”; b) *Same-day visitors*: “a visitor who does not spend the night in a collective or private accommodation in the country visited”.

When a person visits the same country several times a year, an equal number of arrivals is recorded. Likewise, if a person visits several countries during the course of a single trip, his/her arrival in each country is recorded separately. Consequently, *arrivals* cannot be assumed to be equal to the number of persons travelling.

Tourism receipts data are obtained from the item “travel, credits” of the Balance of Payments of each country and corresponds to the “expenditure of non-resident visitors (tourists and same-day visitors)” within the economic territory of the country of reference.

Fare receipts data are obtained from the item “transportation, passenger services, credits” of the Balance of Payments of each country and corresponds to the “fare expenditure of non-resident visitors (tourists and same-day visitors)” within the economic territory of the country of reference.

Outbound tourism

Departures associated to outbound tourism correspond to the departures of resident visitors outside the economic territory of the country of reference.

Tourism expenditure data in other countries are obtained from the item “travel, debits” of the Balance of Payment of each country and corresponds to the “expenditure of resident visitors (tourists and same-day visitor)” outside the economic territory of the country of reference.

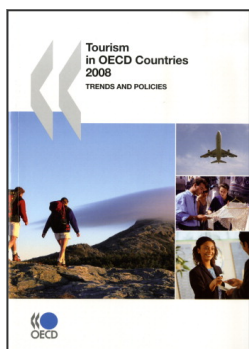
Fare expenditure data in other countries are obtained from the item “transportation, passenger services, debits” of the Balance of Payment of each country and corresponds to the “fare expenditure of resident visitors (tourists and same-day visitor)” outside the economic territory of the country of reference.

Symbols and abbreviations used

.. Not available

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