



OECD TOURISM TRENDS AND POLICIES 2022

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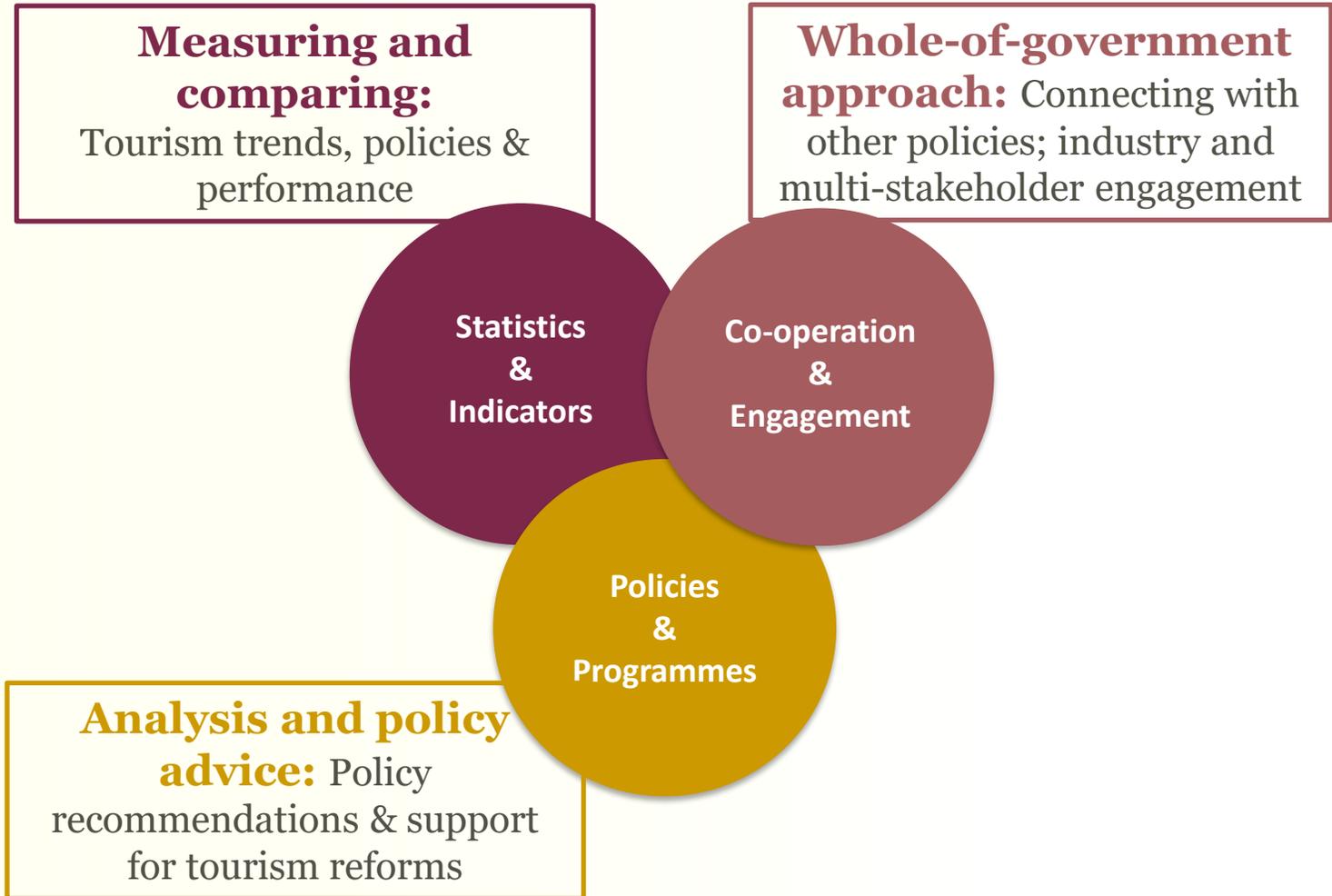


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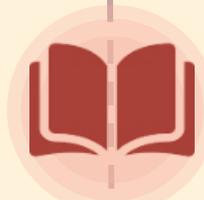
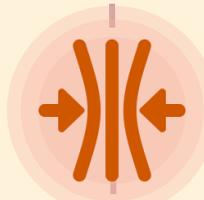




OECD's integrated approach to tourism

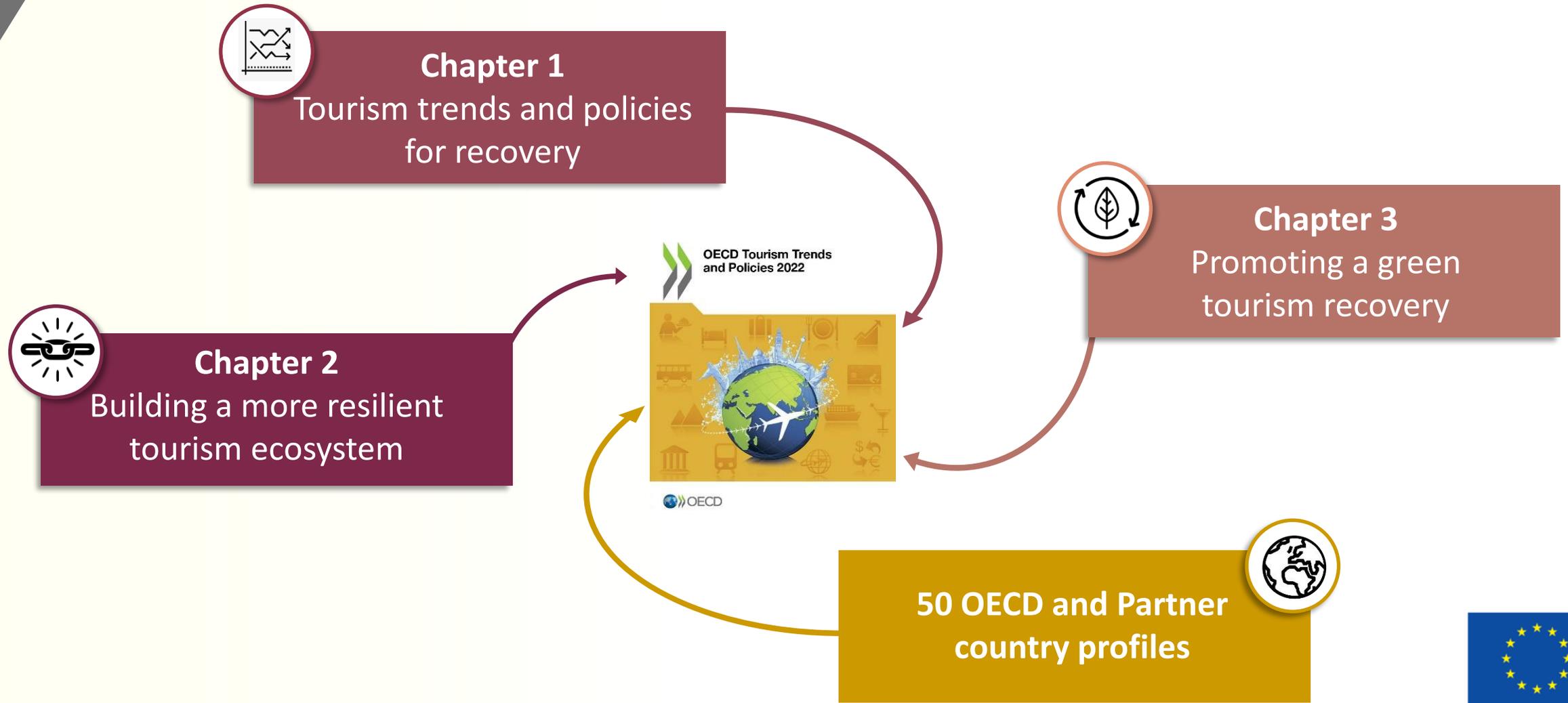


TOURISM COMMITTEE PWB 2023-24 PRIORITIES

-  **TRENDS AND POLICIES**
OECD Tourism Trends and Policies 2024
-  **DATA AND EVIDENCE**
Improving tourism data for policy, tourism database
-  **RESILIENCE AND SUSTAINABILITY**
Building a resilient tourism economy, supporting sustainable tourism development



OECD Tourism Trends and Policies 2022



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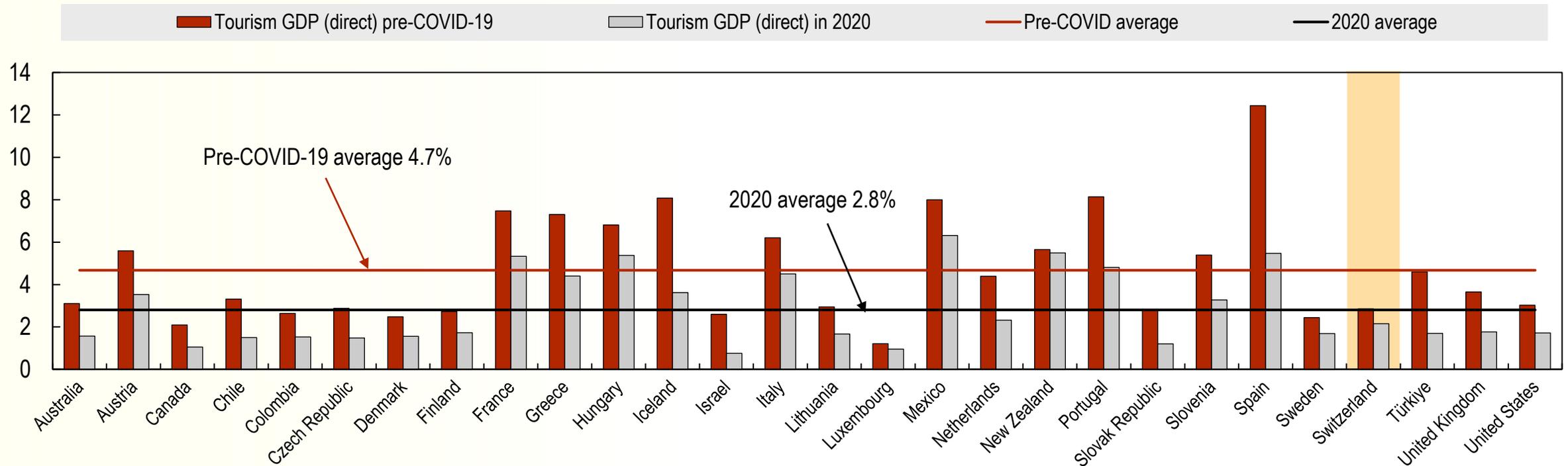
COVID-19 hit tourism hard, highlighting sector's role as a driver of economic prosperity ...

GDP ▼ 1.9 ppt on average to 2.8%*

Services exports ▼ 10.6 ppt to 9.9%*

Employment ▼ 0.8 ppt on average to 4.3%**

Direct GDP contribution of tourism to selected OECD countries, pre-COVID-19 and 2020



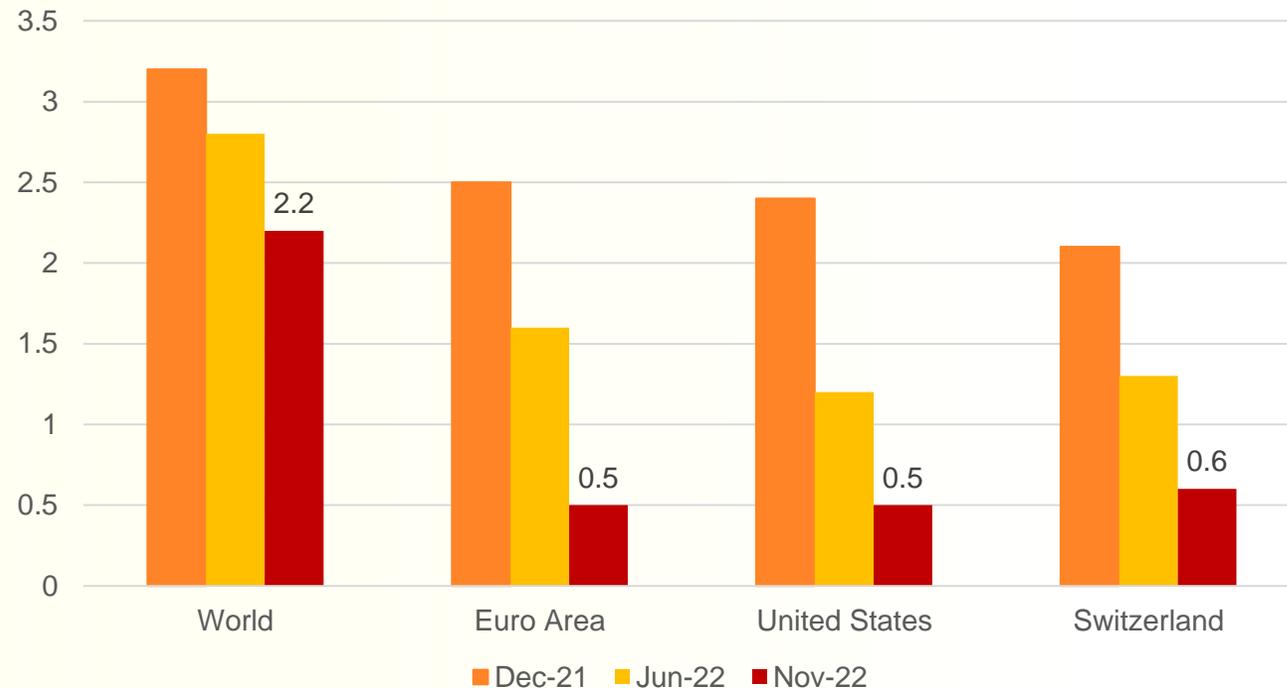
*Across OECD countries with data available **Across reporting OECD countries that prepared a Tourism Satellite Account



... while the slowdown in economic growth and the cost of living crisis brings new risks for the sector

Impact of Russia's war in Ukraine on GDP in 2023

Real GDP growth, per cent, across different projection cycles



Source: OECD, Economic Outlook, December 2021, June 2022, November 2022.

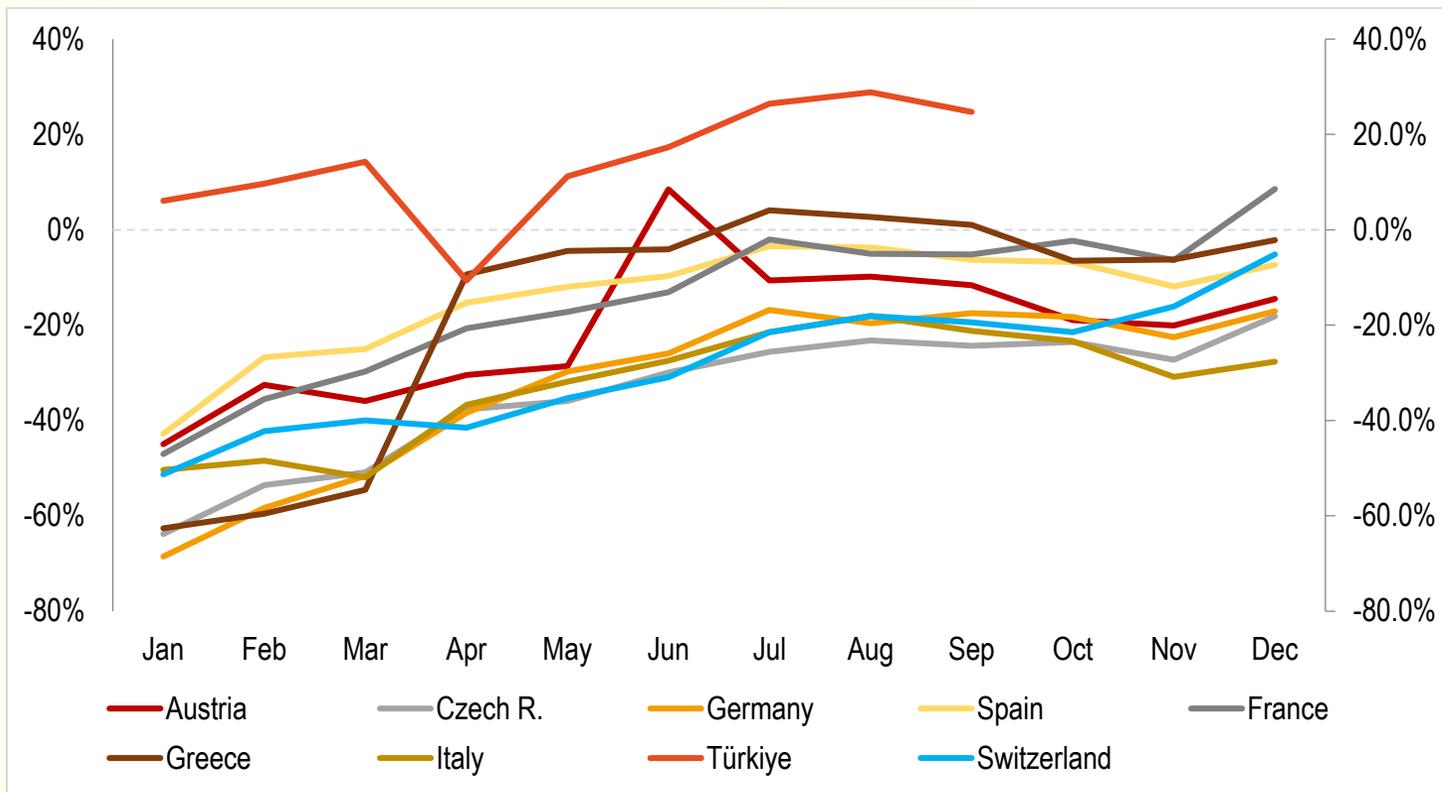
- ❖ Global economic growth is slower than anticipated, with projections downgraded
- ❖ Energy price shock and inflation have triggered a cost of living crisis
- ❖ Inflation is expected to moderate – but remain at high levels in 2023

Brings new uncertainties for tourism, casting a cloud over recovery expectations



Strong tourism rebound in 2022 was driven by pent up demand, but is uneven and risks faltering ...

Monthly hotel nights 2022 v. 2019, selected countries with available data



Source: Eurostat, Tourism Database

- ❖ Rebound in international tourism raised hopes of a **demand-driven recovery**
- ❖ **Tourism performance varies widely** across countries, destinations and source markets
- ❖ **Inflation, economic uncertainty, energy constraints and labour shortages** - key concerns for recovery



... as the economic outlook and fall out from Russia's war in Ukraine brings new challenges for tourism

Tourism is ...

A labour intensive sector



Looking to rebuild in a tight labour market

Reliant on the movement of people



Oil and energy prices reached record levels

Built on hospitality



Food prices continue to increase

Encouraged by safety and security



Ongoing impact of Russia's war in Ukraine

A discretionary spend item

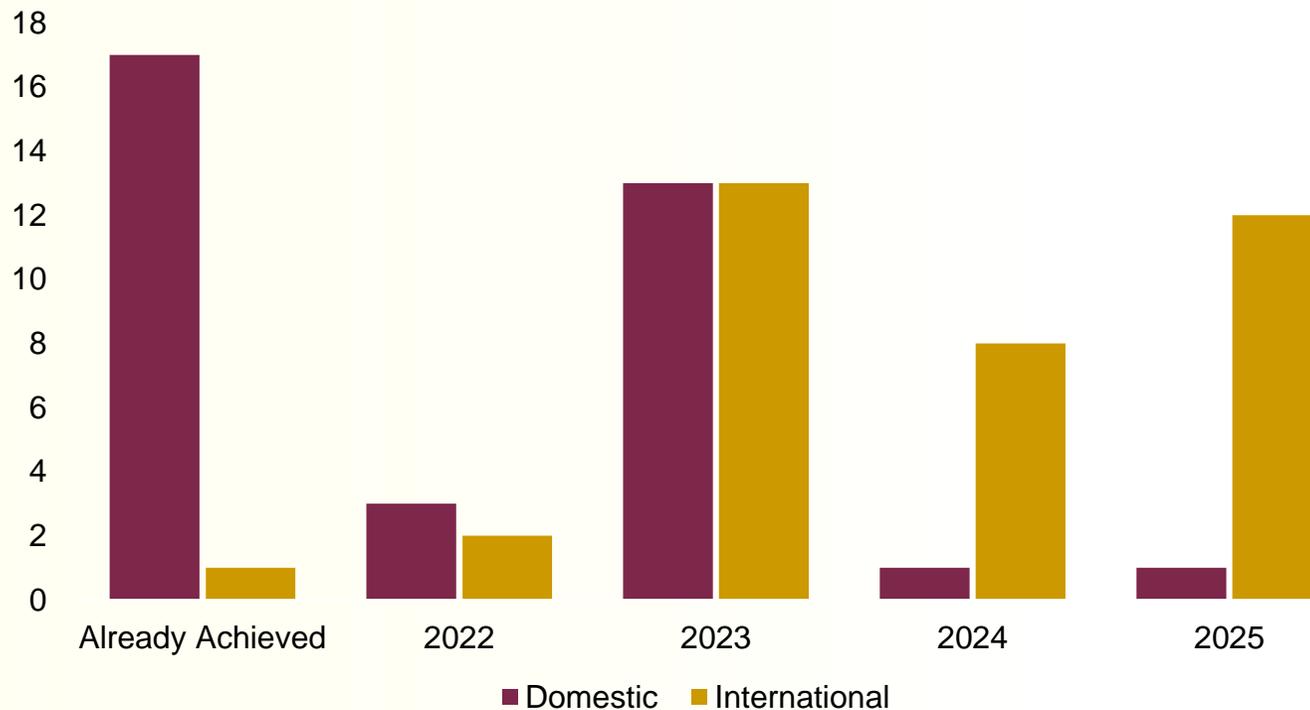


Real wages and household savings rates are declining



Outlook uncertain, with tourism recovery now expected to take longer, up until 2025 or beyond

Reported country expectations (in Q4 2022) of recovery to pre-pandemic levels: international vs domestic



- ❖ Tourism performance in **2022 exceeded expectations** in many countries
- ❖ **Domestic recovery** is expected by the end of **2023**
- ❖ **International recovery** is expected to take up until **2025**, or later
- ❖ **Reopening of China** boosts prospects, but will take time for visitors to return

Source: OECD Quick Survey, Q4 2022



Strengthening the governance of tourism to consolidate the recovery and support transformation of tourism

- ❖ Better **co-ordination and capacity** across government for agile, targeted policies
- ❖ Enhancing engagement with the **private sector**
- ❖ Promoting **international and multilateral co-operation** to boost recovery
- ❖ Developing **strategies** amid uncertainty to shape a sustainable and resilient recovery



ACTIONS TO IMPROVE GOVERNANCE

- **GERMANY** - a steering committee across relevant ministries established to develop National Tourism Strategy
- **NETHERLANDS** – tourism and leisure taskforce to strengthen co-operation between national government and industry stakeholders
- **IRELAND** - Sustainable Tourism Working Group sets the ambition and roadmap for sustainable tourism practices



Tackling multiple crises has highlighted urgency to build tourism resilience





Enhancing tourism resilience for a stronger future



DESTINATIONS

France launched the Avenir Montagne plan to enhance sustainable and resilient mountain tourism, encourage diversification, green transition, revitalise the offer



BUSINESSES

'**Chile Supports Tourism 2022**' is designed to finance training, business planning, consultancy, technical assistance, working capital and/or investment for tourism-related projects.



WORKFORCE

Workforce pressure eased in **Ireland** as employers increase pay rates, introduce more flexibility in shift patterns and introduce penalty rates, support by a campaign by Fáilte Ireland and industry partners



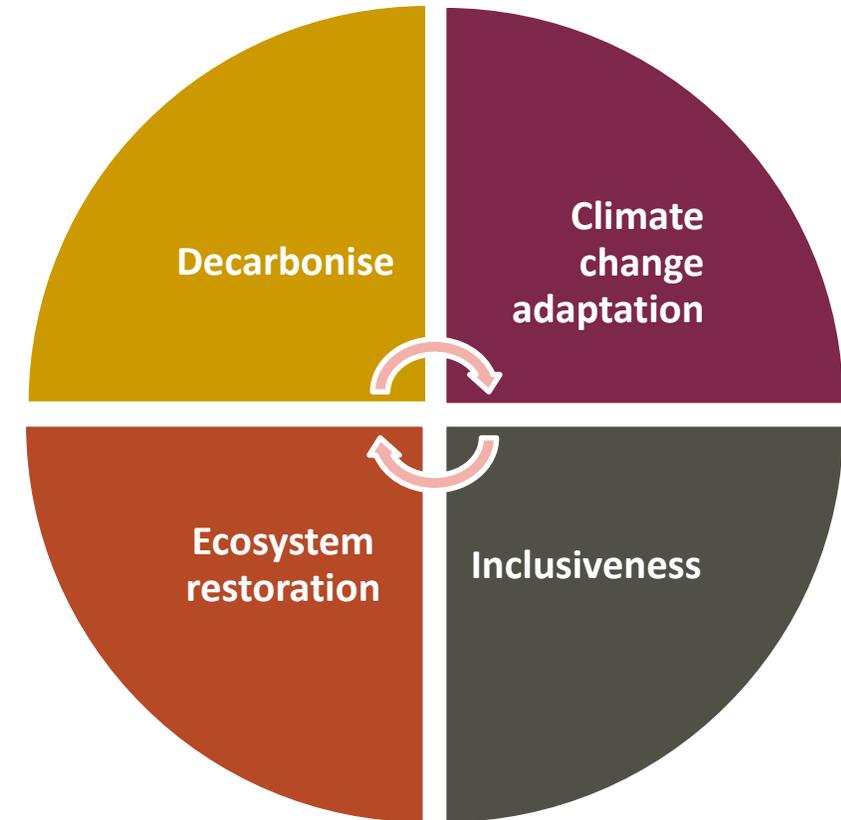
DATA

The **European Commission** is using available data to develop an EU Tourism Dashboard measuring environmental, digital and socio-economic pillars, to monitor tourism resilience



Seize opportunity to promote a green tourism recovery and transition

- ❖ **Leverage resources** across government to implement mix of policies, prioritising high impact interventions
- ❖ Increase **carbon literacy and capacity** of actors to develop innovative solutions and make green choices
- ❖ Promote **greener tourism infrastructure**, services and experiences, build climate resilience in destinations
- ❖ Regulate and incentivise **green business practices**, and help businesses reduce their environmental impact
- ❖ Encourage **greener tourist behaviours**, travel choices
- ❖ Set targets, and **measure and monitor** progress





Promoting the green transition, including with strategies and targets actions for businesses and destinations



AUSTRIA

A new ecolabel for tourism destinations with mandatory criteria to accelerate the green transition and improve regional value chains



CANADA

Upgraded Community Energy and Climate Action Plan in Whistler to reduce GHG emissions by 50% below 2007 levels by 2030, targeting transport, buildings, and waste



DENMARK

A public-private tourism partnership for initiatives to contribute to the national target of a 70% reduction in GHG emissions in 2030



SOUTH AFRICA

Green Tourism Incentive Programme assists SMEs to adopt sustainable tourism practices through grant funding

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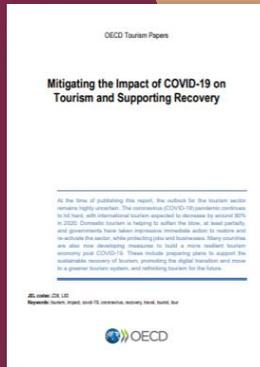
OECD Tourism Trends and Policies 2022

focuses on key tourism trends and policy reforms to support recovery across 50 OECD and partner countries

- ❖ Undertaken in partnership with the European Commission
- ❖ Data available on [OECD.Stat](https://data.oecd.org/)
- ❖ 2022 edition is now available on the OECD *iLibrary* - in English and [Abridged French](#) version
- ❖ Executive Summary in 12 languages including [French](#), [German](#) and [Italian](#)
- ❖ Highlights in [English](#), [French](#), [Italian](#) and [German](#) (forthcoming)
- ❖ For more information: www.oecd.org/cfe/tourism/



Find out more – 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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