

# OECD *Multilingual Summaries*

## OECD Tourism Trends and Policies 2018

Summary in English



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Tourism is a major economic sector, directly contributing, on average, 4.2% of GDP, 6.9% of employment and 21.7% of services exports in the OECD area. Recent trends point to continued growth and outreach: globally, international tourist arrivals grew to over 1.2 billion in 2016, and OECD countries play a prominent role, with arrivals up 3.9%, representing 55% of the global total and accounting for 60.4% of global travel receipts (up 2.6% in real terms, reaching USD 1 226 billion in 2016). Despite widespread downward pressure on public finances, budgets for tourism have largely been maintained or increased, due to awareness of the important economic contribution of the sector.

Sustained development of the tourism sector will depend upon its ability to adapt to emerging economic, social, political, environmental and technological trends. Fulfilling tourism's potential as an engine for sustainable and inclusive growth will require the development of sound policies, integrated strategies, inter-ministerial structures, and mechanisms that involve the private sector and other stakeholders in tourism governance.

A large majority of countries have dedicated tourism policies, strategies and plans for the medium to long-term. There is much similarity between countries in their tourism policy priorities, which focus on improving competitiveness, sustainability and inclusiveness, addressing seasonality of demand, and enhancing the quality and appeal of the tourism offer. The last two years have seen a growing recognition of the importance of the development, management and promotion of local destinations, supported by regional or local structures and funding, and the preparation and execution of destination management plans.

A wide range of actions have been taken to develop and market distinctive products and destinations. Marketing activities have included various examples of successful regional and thematic branding. Many countries have established new offers and experiences based on their natural and cultural assets, and pursued opportunities for year-round growth through the promotion of health and wellness tourism, business tourism, events and various niche products. Tourism policies continue to give a high priority to opportunities presented by digitalisation, both in creative and targeted communication and in the handling and analysis of data.

The growth of international travel, notably from the Chinese and other Asian markets, is providing opportunities in all continents. Further action has been taken to improve connectivity and reduce barriers to travel, including visa requirements and entry procedures, while also addressing growing concerns about security. At the same time, various countries have strengthened promotion in the domestic market, including initiatives to extend holiday opportunities for all.

Supply-side policies to improve competitiveness include investment promotion and the simplification of business regulations, while recognising that there may be a need to extend and clarify regulations in emerging areas such as informal tourism services promoted through on-line platforms. The need to address labour and skills shortages in the sector is recognised as a key issue in many countries, requiring action to improve the awareness and attractiveness of careers in tourism and the availability of relevant training.

The declaration by the United Nations of 2017 as the International Year of Sustainable Tourism for Development has drawn further attention to the sustainable tourism agenda and the contribution of the sector to the Sustainable Development Goals. This is reflected in policy priorities in many countries, with actions taken to improve the monitoring of tourism impacts, extend certification schemes, encourage the use of new technologies and green finance instruments, and generally promote environmentally sustainable and socially inclusive tourism growth.

## Key policy messages

### *Fostering an integrated policy approach*

- Develop long-term strategies that consider the trade-offs and complementarities with related policy areas, and clearly identify the roles, functions, and interactions of key stakeholders.
- Recognise the value of strong dialogue between government, industry, and civil society in the development, implementation and monitoring phases.

### *Preparing for megatrends*

- Build systemic and strategic approaches to adapt in an increasingly fast-moving, inter-connected and dynamic environment.
- Modernise regulatory and legislative frameworks, broadly engaging with key stakeholders in their development, and supporting predictive mechanisms in the policy and regulatory process.
- Cultivate partnerships with industry, other governments, and civil society to address the cross-cutting impacts of megatrends, and developing responses that account for new and innovative business approaches to service delivery.
- Take steps to future-proof tourism policy and promote a culture of innovation and change management within government to ensure that long-term megatrends are given due consideration, notably through robust data analysis and scenario planning.

### *Promoting investment and financing for sustainable tourism*

- Incorporate environmental and sustainability criteria into public financing and investment supports, and encourage the uptake of green financing instruments for tourism projects, notably by leveraging private investment.
- Encourage more responsible business practices in tourism through the integration of environmental and social criteria into tourism policies and programmes, mobilisation of green investors, and uptake of sustainable practices by businesses.
- Build capacity and better co-ordinate actions across different levels of government and policy areas, including tourism, environment and innovation, to support the shift to more sustainable tourism investment and financing practices.
- Improve data and analysis on green finance and investment in sustainable tourism development, to accurately integrate environmental risk into tourism financing and investment decisions, and develop a better understanding of the economic, social and environmental outcomes of tourism investment.

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