

Foreword

OECD Tourism Trends and Policies is an international reference and benchmark on how countries are supporting sustainable and inclusive tourism growth. The publication highlights good practices and key policy and governance reforms, providing a global perspective with the inclusion of 50 OECD member and partner countries. It is a rich source of data on domestic, inbound and outbound tourism, as well as on the overall size of the tourism economy, and provides comparative knowledge through thematic chapters and country-specific policy and statistical profiles.

The 2022 edition of OECD Tourism Trends and Policies follows nearly three unprecedented and challenging years for the tourism economy and comes at a time of uncertainty for the recovery that had begun to take roots. Tourism was hit hard by the depth and duration of the crisis triggered by the COVID-19 pandemic. The shock has been a reminder of the tourism's vital role as an economic and social force in OECD member and partner countries. Tourism is a key part of a growing services economy, and an important source of job creation, export revenue and domestic value added. Before the pandemic, across OECD countries, on average, tourism directly contributed 4.4% of GDP, 6.9% of employment and 20.5% of service-related exports.

While the rebound seen in tourism in 2022 exceeded expectations in many countries, the economic fallout from Russia's aggression against Ukraine, and the changed economic and geopolitical context brings new challenges and casts a shadow over the recovery outlook. As tourism navigates these challenges, policy makers must not miss the opportunity to learn the lessons from the pandemic and put in place measures to shape a more resilient, sustainable and inclusive tourism economy for the future.

Continued growth in tourism over six decades led to the widely held belief in the inherent resilience of the tourism economy. The crisis has aggravated new and existing structural weaknesses and highlighted the need for tourism to be better prepared to respond, adapt and recover from future shocks. Urgent action is also needed to address the existential threat from climate change. Tourism is reliant, and impacts, on the natural environment, and more needs to be done to accelerate the transition to greener models of tourism.

OECD Tourism Trends and Policies 2022 provides an analysis of tourism performance and policy approaches to support the recovery. It examines key tourism recovery challenges and the outlook, and highlights the need for co-ordinated, forward-looking policy approaches to set tourism on a path to a more resilient, sustainable and inclusive future. Tourism policy priorities, reforms and developments are analysed, and examples of country practices highlighted. Thematic chapters provide insights on building resilience in the tourism ecosystem and promoting a green tourism recovery.

This flagship publication was produced by the Centre for Entrepreneurship, SMEs, Regions and Cities (CFE) of the OECD, with co-financing from the European Union. It was approved by the OECD Tourism Committee through written procedure in October 2022.

Acknowledgements

This report presents the 2022 edition of the OECD Tourism Trends and Policies publication. It was produced by the OECD Centre for Entrepreneurship, SMEs, Regions and Cities (CFE), led by Lamia Kamal-Chaoui, Director, as part of the programme of work of the OECD Tourism Committee. The report was undertaken in co-operation with the European Union*.

The report benefitted from significant contributions, feedback and guidance from policy makers and statisticians from OECD member and partner countries. It also benefitted from consultation and feedback from industry representatives and associations, including Business@OECD, and intergovernmental organisations, including UN Environment, UN World Tourism Organization (UNWTO) and the International Labour Organization (ILO). The report has also been informed by discussions at the Global Forum on Tourism Statistics, Knowledge and Policies hosted by Korea in 2021, on the theme *Reshaping tourism for a more resilient and sustainable tomorrow*,

The report was co-ordinated and edited by Jane Stacey, Head of the Tourism Unit, under the supervision of Celine Kauffmann, Head of the Entrepreneurship, SMEs and Tourism Division (CFE) and Nadim Ahmad, Deputy Director (CFE). She was supported by Kristen Corrie, Policy Analyst (CFE), co-author of chapter 1 and author of chapter 2, as well as James Tops, Junior Policy Analyst (CFE) and Jenna Cunningham, Junior Consultant, who managed the preparation of the country policy profiles and undertook substantial co-ordination, drafting and editing. Sergio Montoya, Statistician (CFE), managed the statistical database and developed country statistical profiles and synthesis tables. Monserrat Fonbonnat, Assistant (CFE), provided administrative support. Pilar Philip and François Iglesias (CFE) served as publication co-ordinators. The statistical component of the report is available via the OECD's statistical online platform – OECD.Stat.

Richard Dickinson (*Tomorrow's Tourism*) provided drafting inputs for Chapter 1 and the country profiles. Chapter 3 was drafted by Susanne Becken and Daniel Scott (University of Surrey), with inputs from the Secretariat. In addition, the report benefitted from contributions and feedback provided by other OECD colleagues in the Centre for Entrepreneurship, SMEs, Regions and Cities (CFE) and the Environment Directorate (ENV).



* This document was produced with the financial assistance of the European Union. The views expressed herein can in no way be taken to reflect the official opinion of the European Union.



From:
OECD Tourism Trends and Policies 2022

Access the complete publication at:

<https://doi.org/10.1787/a8dd3019-en>

Please cite this chapter as:

OECD (2022), "Foreword", in *OECD Tourism Trends and Policies 2022*, OECD Publishing, Paris.

DOI: <https://doi.org/10.1787/a5d832d4-en>

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