Foreword

Tourism is one of the largest and fastest growing sectors in the world economy. It plays a key role in job creation, export revenue and domestic value added, and directly contributes, on average, 4.2% of GDP, 6.9% of employment and 21.7% of service exports in OECD countries. Globally, international tourist arrivals grew to over 1.2 billion in 2016, with arrivals to OECD countries accounting for just over half and matching the global growth rate of 3.9% as compared to 2015.

OECD Tourism Trends and Policies 2018 focuses on key policy and governance reforms in tourism and provides a global perspective with the inclusion of 49 OECD and partner countries. As always, it is a rich source of data on domestic, inbound and outbound tourism, and on the size of the tourism economy, and provides a clear picture of new policies designed to improve destination competitiveness.

With the tourism economy evolving rapidly, major long-term trends, such as changing demographics, evolving demand, digitalisation, and climate change, present new opportunities and challenges. As such, OECD Tourism Trends and Policies 2018 explores the impacts and relevance of megatrends for tourism to 2040. It underlines the need for countries to develop strategic approaches to adapt in an increasingly dynamic environment, as well as modernise regulatory and legislative frameworks, building on broad stakeholder engagement and taking account of new and innovative business approaches to service delivery.

This report also examines the need for a shift to investment and financing practices that better support sustainable tourism development. It particularly highlights that governments can promote investment and financing for sustainable tourism development by encouraging the uptake of green financing instruments, and by incorporating environmental and sustainability criteria into public financing and investment supports. Policies are also needed to better co-ordinate actions across government, and encourage more responsible business practices through the integration of environmental and social criteria into tourism policies and programmes. It is therefore essential that government, industry and civil society collaborate in order to take work forward in these areas.

Many of these policy issues were discussed at the 2017 OECD High Level Meeting on Tourism, where 45 member countries and partner economies endorsed the Policy Statement, Tourism Policies for Sustainable and Inclusive Growth. The Policy Statement recognises that tourism has an important role to play in the transition to a green economy and that an in-depth analysis of megatrends can help policymakers to bring currently unforeseen and emerging issues onto the strategic policy agenda. It highlights that a shift to more coherent and comprehensive approaches to tourism policy development will help reframe tourism growth to better spread the benefits, address inequalities, and improve the resilience of economies.
I would like to thank the OECD Tourism Committee for their work in preparing OECD Tourism Trends and Policies 2018, in partnership with the European Union. This publication remains an international reference and benchmark on how effectively countries are supporting sustainable and inclusive tourism growth.

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OECD Secretary-General
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OECD Tourism Trends and Policies 2018 highlights good practices and key policy and governance reforms in tourism, providing a global perspective with the inclusion of 49 OECD and partner countries. The report is part of the programme of work of the OECD Tourism Committee, and is undertaken with the cooperation of the European Union. It is a rich source of data on domestic, inbound and outbound tourism, and on the size of the tourism economy, and provides a clear picture of new policies designed to improve destination competitiveness.

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