



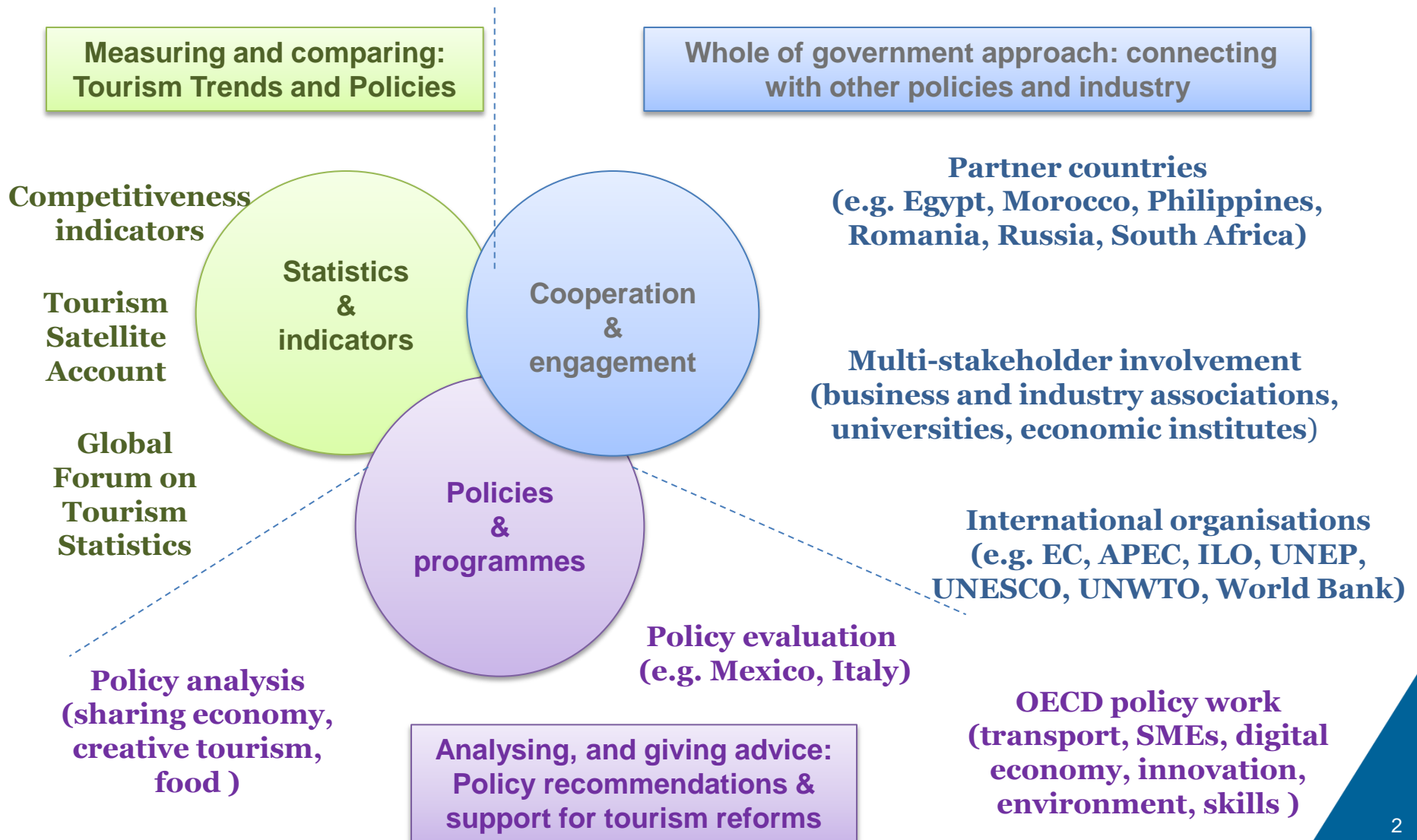
Travel and Tourism Global Trends

A policy perspective

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OECD's integrated approach to tourism





What is the value of tourism in the OECD area?

OECD area

4.1% direct
GDP



54% international
tourist arrivals



5.9% employment

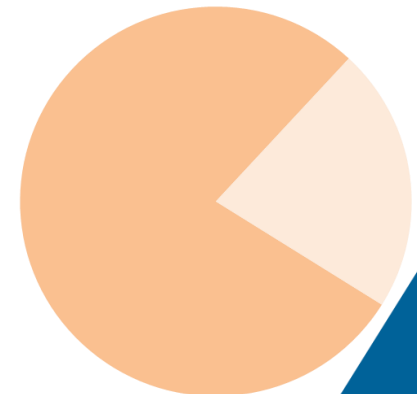


21.3% of service
exports



€1 Value Added in
tourism results in 56c
VA in upstream
industries

77% domestic
consumption





Tourism Towards 2030

- Global growth in international tourist arrivals will continue, but at a more moderate pace due to:
 - Higher base volumes
 - Lower GDP growth
 - Rising transport costs
- International tourist arrivals now surpass 1 billion and will reach 1.8 billion by 2030 (UNWTO)
- Many new arrivals will be to destinations in Asia, Latin America, Central/Eastern Europe, Africa & the Middle East
- China an increasingly important source market



Policies supporting tourism: the need for adjustment

- Changing global tourism market trends and evolving customer and industry needs require adjustment in order to remain competitive and sustainable over time
- The tourism industry faces important challenges
 - How to make growth stronger in mature tourism destinations
 - How to make tourism growth more inclusive and of benefit to local communities
 - How to make tourism growth more sustainable
 - How to address the safety and security issues
- Appropriate policy responses should be implemented to address tourism growth performance



The critical importance of governance

- Develop integrated tourism strategies with medium to long-term horizons
- Develop horizontally and vertically integrated policy frameworks - a whole of government approach
- Involve all economic players to increase policy effectiveness and market orientation
- No unique solution. Each case of governance is specific



Policy priorities to respond to consumer changes

- Make destinations distinctive in the global tourism market
- Support a competitive and sustainable tourism industry
- Effectively adapt to the digital economy, and re-think policies to address sharing economy challenges and opportunities
- Adapt to the climate change challenge
- Improve tourism statistics and strengthen the evidence base



Innovative policy actions to support tourism

- Develop strategies to enhance the attractiveness of the destination
- Identify new funding models for tourism promotion
- Support innovative workforce development approaches
- Provide innovative support to small firms
- Promote sustainable tourism development



Effective policies for tourism growth

Policy considerations to support tourism growth that is greener, stronger and more inclusive:

- Better understand the unique inter-linkages, synergies and trade-offs between tourism and related policy areas
- Implement institutional arrangements to establish and leverage policy synergies
- Better understand and more effectively demonstrate the value of tourism
- Evaluate the costs and benefits of policy options from both a short-term and long-term perspective
- Better understand tourism's current and potential impacts on natural resources
- Provide an environment to support the creation and growth of small-scale businesses in both urban and rural areas
- Promote closer co-operation between relevant international organisations



To find out more –

www.oecd.org/cfe/tourism

<http://dotstat.oecd.org/>



Publications

- Tourism Trends & Policies (2008, 2010, 2012, 2014, 2016)
- Statistical Initiatives Measuring Tourism at Subnational Level (2016, forthcoming)
- Effective Policies for Tourism Growth (2015, available online)
- Supporting Quality Jobs in Tourism (2015, available online)
- Tourism and the Creative Economy (2014)
- Indicators for Measuring Competitiveness in Tourism (2013, available online)
- Green Innovation in Tourism (2012, available online)