



# OECD TOURISM TRENDS AND POLICIES 2024

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#OECDtourism

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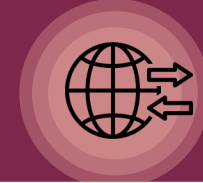




# Tourism had already bounced back in some countries in 2022

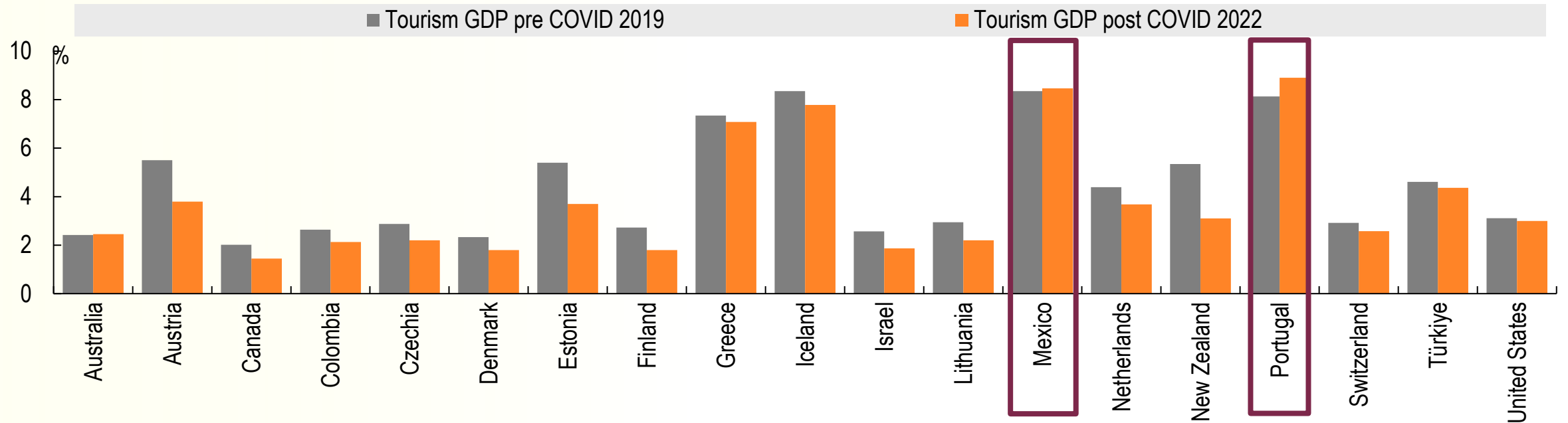


**GDP\***  
**3.9% on average**  
▲ 1.4 ppt on 2020



**Services exports**  
**14.8%**  
▲ 4.8 ppt on 2020

Direct GDP contribution of tourism to selected OECD countries, pre-COVID-19 and 2022

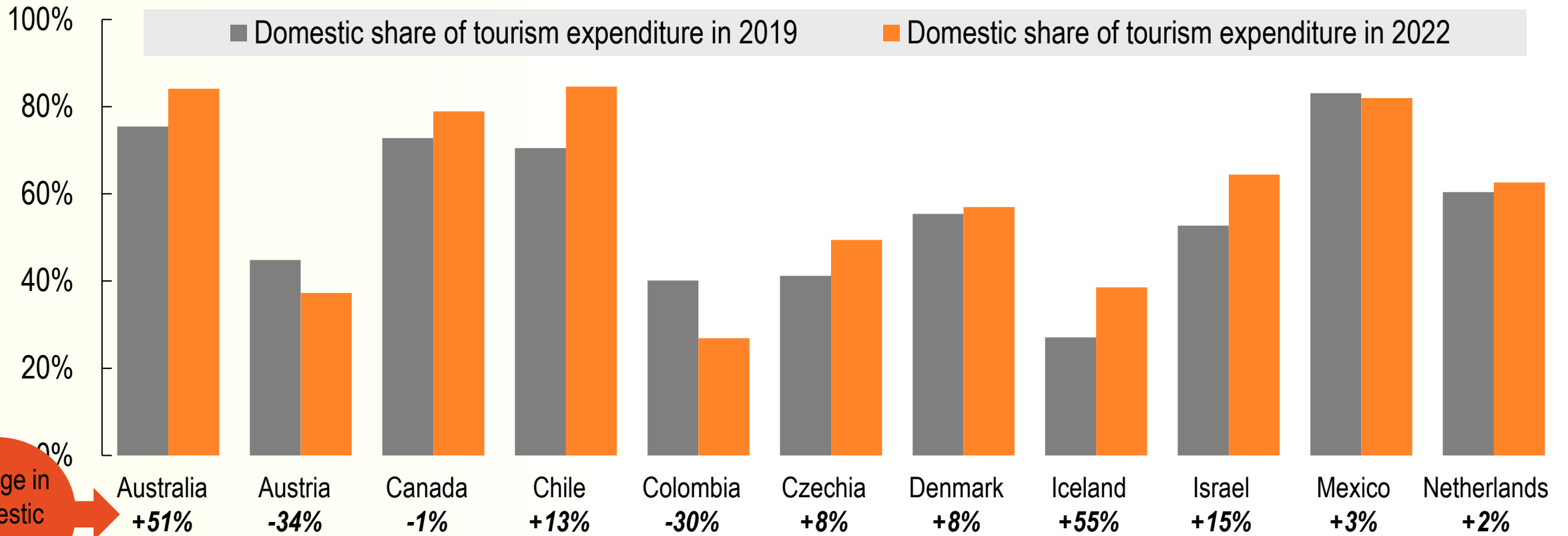


\*Across OECD countries with data available \*\* Employment refers to accommodation and food services sector which accounts for around half of all direct tourism employment in OECD countries. Note: Australia pre COVID data refers to 2019-20, Costa Rica post COVID data refers to 2023.



# Domestic tourism has supported the sector through times of uncertainty

Domestic share of tourism expenditure in selected OECD countries, 2019 and 2022

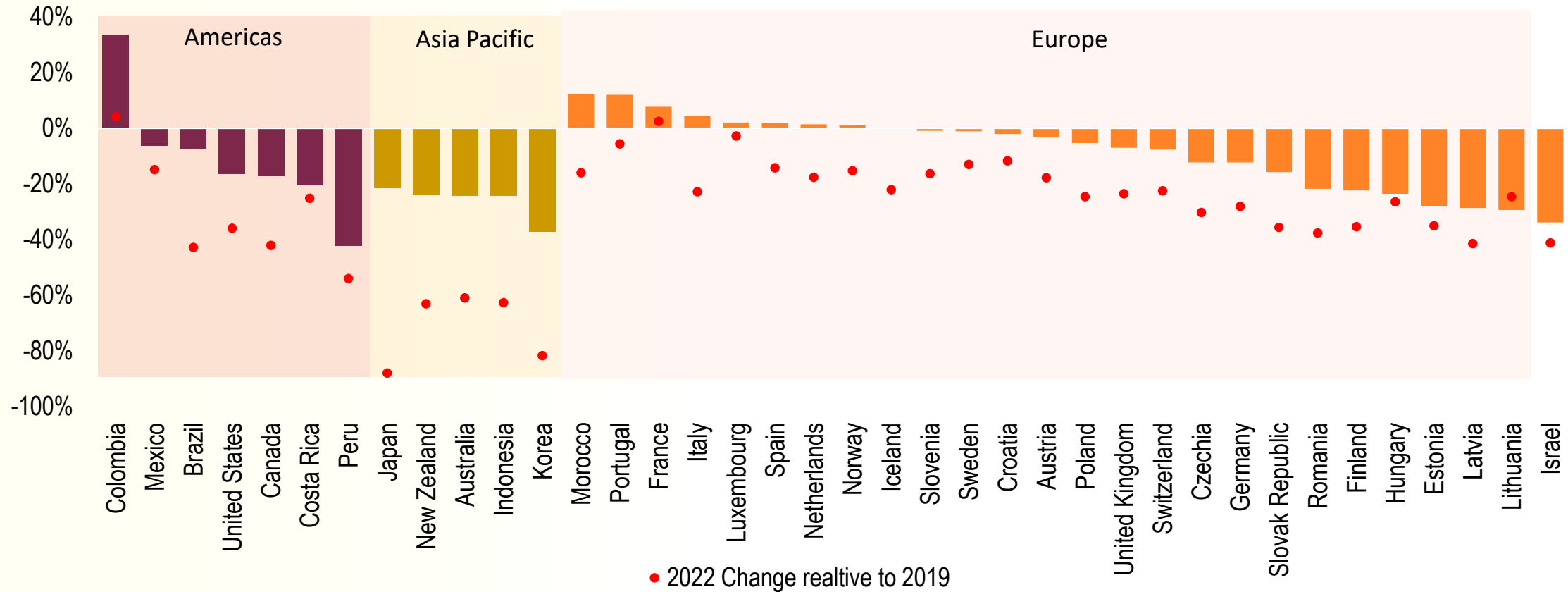


Source: OECD Tourism Statistics (Database).



# International tourism demand is recovering, but unevenly and there are renewed challenges

International tourist arrivals in 2022 and 2023 compared to 2019, selected OECD and partner countries

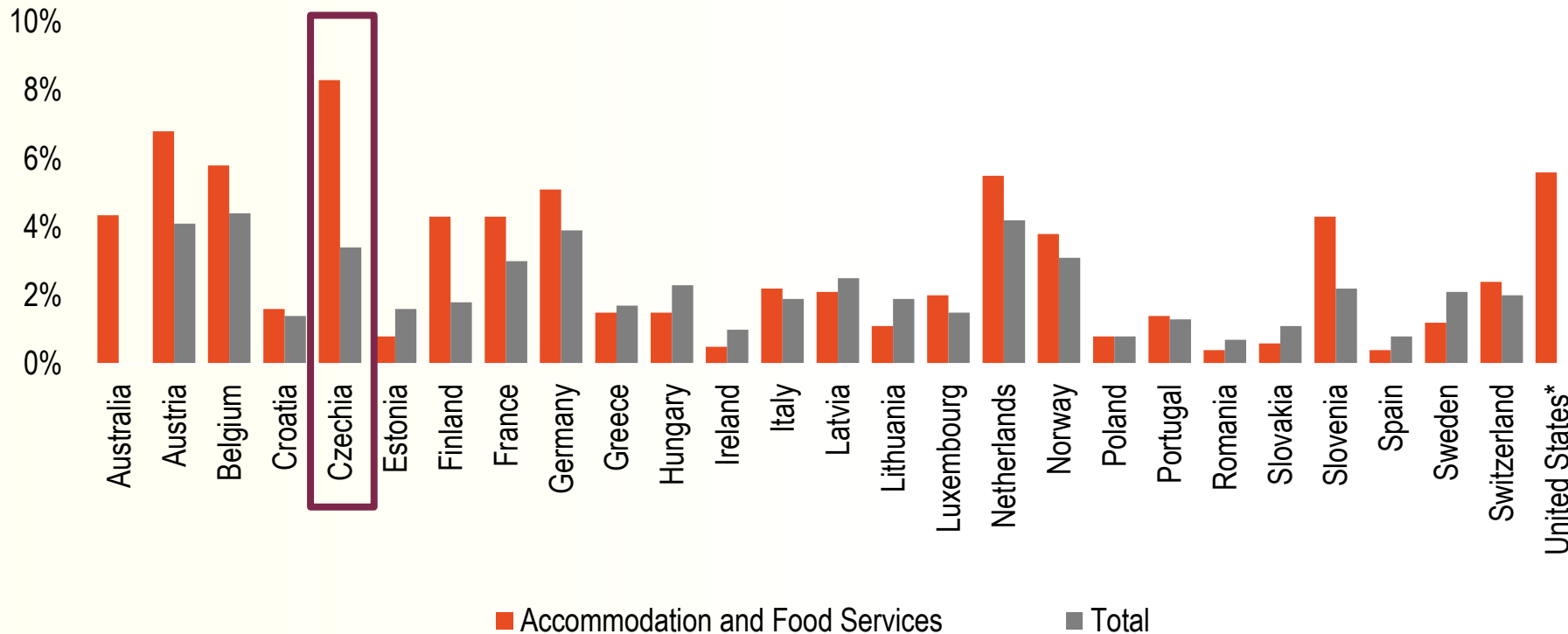


Source: Eurostat, Australian Bureau of Statistics, Statistics Canada, Costa Rica Tourism Institute, Japan Tourism Statistics, Korean Ministry of Culture, Sports and Tourism, Statistics New Zealand, 2024



# Tackling labour shortages and skills gaps is a key priority, as businesses struggle to attract and retain workers ...

Job vacancy rates in Accommodation and Food Services sectors compared to all industries in Q4 2023



Accommodation and food services account for **43-63%** of the **Tourism Workforce**

Note: Australian vacancy rates have been derived from available data. \*United States vacancy rates are seasonally adjusted.  
Source: OECD calculations



# ... to build a strong and sustainable tourism workforce for the future

Address the needs of tourism workers in wider planning

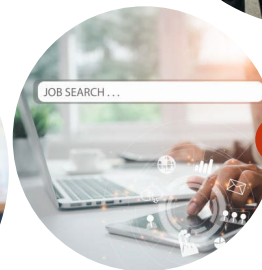


Facilitate linkages between the private sector and education providers



Leverage and support private sector initiatives

Support tourism SMEs and workers to adopt and adapt to digital technology



Collect and share data on tourism workforce issues



# Strong rebound in tourism has highlighted the need for more balanced and sustainable tourism development





# Reinforcing the importance of evidence-based tourism policies for a resilient, sustainable and inclusive future



Bolster co-ordination and delivery structures to empower destinations to manage tourism and drive momentum for change



Encourage broad stakeholder engagement to deliver more equitable and inclusive benefits to impacted by tourism.



Implement forward-looking strategies to boost tourism's role in climate action and take advantage of new technologies.





# This calls for more timely and reliable data to support tourism decision-making, at all levels of government

Better understand the policy priorities for sustainable tourism



Address data gaps for priority sustainable tourism development issues.



Tailored toolkits of evidence to facilitate decision making at the destination level.



Collaborative approaches to design tools and metrics for sustainable tourism development.



Develop the data literacy of decision makers.





**Thank you!**

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