

## **Book Review**

### **OECD Tourism Trends and Policies 2022 OECD Publishing, Paris**

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OECD Tourism Trends and Policies 2022 is a comprehensive discussion on post-pandemic tourism trends that examines diverse topics such as tourism ecosystem, green tourism, and developing tourism resilience for a brighter future. As stated in the executive summary, the unprecedented depth and duration of the COVID-19 shock continue to pose significant challenges to the tourism industry. Restrictions on the movement of people have severe economic and social repercussions for tourism employees and businesses, destinations, and the ecosystem as a whole. Furthermore, the unprecedented shock to tourism has prompted governments at all levels and the private sector to respond in a coordinated manner to support and consolidate a sustainable and resilient recovery. Restoring safe mobility and consumer confidence remains a priority, as does assisting vulnerable tourism businesses and destinations facing labor and skills shortages and investing to diversify the tourism offer. The book summarizes three key policy messages: forward-thinking policies, building resilience in the tourism ecosystem, and promoting a green tourism recovery.

The introductory chapter states that tourism fuels global, national, and local economies. Prior to the pandemic, tourism contributed 4.4 percent of OECD countries' GDP, 6.9 percent of employment, and 20.5 percent of service-related exports. The sector generates income, foreign exchange, jobs, regional development, and community support in an expanding services economy. Prior to the pandemic, OECD estimates indicated that indirect impacts accounted for more than one-third of the tourism industry's contribution to the domestic economy. The OECD countries are at the forefront of the economic recovery, but government approaches to

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reopening vary. In 2020, OECD countries hosted 262 million international tourists, 68 percent less than the global average. The modest increase in 2021 (16% to 303 million) exceeded the global average (9%) and appears to have continued into 2022. In 2022, the summer in the northern hemisphere boosted demand in some OECD nations. In January 2022, international tourism in OECD countries declined by 54.6 percent. July 2022 levels were 19.9 percent below 2019 levels. The uneven impact and recovery across countries have altered the leading tourism markets and destinations. Mexico, Turkey, France, Italy, and Spain will receive nearly 38 percent of global tourist arrivals in 2021, surpassing the United States. People's Republic of China has dropped out of the top five and remains off-limits to international tourists.

During the pandemic, domestic tourism suffered less than international tourism. In many countries, domestic tourism resumed prior to international tourism following the easing of local and domestic restrictions in mid-2020. Due to restrictions on international travel, domestic tourism increased. Domestic tourism gained importance as destinations and businesses sought to offset the loss of international markets. Enhanced domestic marketing, travel vouchers, and subsidies have increased the demand for domestic tourism. Nearly half of the OECD and partner countries surveyed on tourism performance and recovery prospects for this chapter reported that performance exceeded expectations in 2022, with many reporting strong domestic results. The rapid return of domestic tourism, pent-up demand, pre-bookings, and unused travel vouchers bolstered the outlook for a recovery in 2022. Tourism performance is below (three-fifths) or significantly below (one-fifth) 2019 levels in most nations. The OECD survey of recent tourism performance and recovery prospects highlights the shift in emphasis as the tourism sector faces numerous challenges beyond the pandemic, with countries highlighting the impact of global inflation and price increases on tourism businesses and tourist spending.

Economic insecurity, energy shortages, and labor shortages hinder the recovery. Travel restrictions are being lifted, but geopolitical unpredictability and the absence of key source markets due to COVID-19 and Russia's war in Ukraine may slow tourism recovery in some nations. As international tourism resumes, visa and travel document backlogs may impede the recovery. Governance arrangements in a country are dependent on the government system. In most OECD countries, economic development or trade ministries oversee tourism. Partnerships between regional development, culture, and sports are common. Since the onset of the pandemic, ad hoc task forces and other frameworks have increased collaboration and coordination between the government, government agencies, and the private sector. Before the pandemic, there was a growing awareness, but it was difficult for policymakers to engage with the tourism players due to their fragmentation and competing interests. This crisis could result in increased public-private cooperation.

Numerous countries are formalizing pandemic collaboration structures for the long term. The government and private sector groups steer the strategic direction, develop action plans for national strategies, and provide guidance for long-term sector development programs. Cooperation and international institutions are crucial. Countries must work together to protect international tourists and businesses. Future shocks will necessitate improved international coordination. Members of the Tourism Crisis Committee included the World Health Organization, the OECD, the International Civil Aviation Organization, the International Maritime Organization, the European Commission, IATA, and the Cruise Lines International Association. International collaboration by these international bodies is required to resume travel, restore traveler and business confidence, stimulate demand, and accelerate the tourism recovery.

Labor and skills shortages are critical measures to be emphasized during the tourism recovery. Tourism is a labor-intensive industry that can provide employment opportunities for youth, women, and migrants. The industry requires talented individuals to adapt to and profit from green and digital transitions to create a competitive tourism product. Tourism trends and broader transitions are altering work and highlighting the need to upskill and reskill the tourism workforce to adapt to shifting consumer and business requirements. COVID-19 compelled tourism workers to look for work elsewhere. Tourism workers were aided by countries' general employee/employment assistance programs and tourism-specific assistance programs. Some independent contractors and informal

workers did not receive these benefits. The inability of businesses to recruit and retain skilled labor is impeding the tourism industry's recovery. The sector must address longstanding wages, working conditions, and reputation issues to attract the necessary workforce. After such a systemic shock, governments may find it challenging to alter the labor market dynamics to address labor shortages. Human-centered crisis recovery and the future of work encourage the lifelong skill development of tourism workers. Small and medium-sized enterprises in the tourism industry lack the resources to replicate the structures of large enterprises. Through public-private support programs, small and medium-sized enterprises may be able to learn from industry leaders or adapt their practices. Large enterprises and numerous SMEs in the tourism value chain may gain from collaborating on human resource issues.

In Chapter Two, the discussion takes place on the importance of building resilience in the tourism ecosystem. Six decades of tourism growth have contributed to the notion that the tourism economy is resilient. Tourism resilience and its effects on capacity building and planning require additional research. Tourism is susceptible to exogenous shocks, but the current economic crisis has revealed endogenous flaws. Policymakers and businesses must address these endogenous weaknesses to build systemic resilience and growth opportunities. As comprehensively debated in the book, sustainability and resilience are interdependent but distinct concepts. Sustainable development meets the needs of the present without compromising those of the future. It requires striking a balance between economic expansion, social inclusion, and environmental protection. Tourism is dependent on the efficient movement of people and value chains. Though, evidence-based crisis response requires reliable data. Since the onset of the pandemic, insufficient data has prevented the development of targeted, evidence-based policies. During the pandemic, administrative and "big data" sources increased. Most discussions in chapter two focused on the importance of the variables described in chapter one, making it easier to relate the industry's resilience post-pandemic.

Finally, Chapter Three examines recent developments in comprehending tourism's effects on the environment and host societies and integrating sustainability into tourism policy. The disruption due to the pandemic offers opportunities to reimagine the tourism industry, accelerate the transition to greener, more sustainable tourism development models through innovative policies, and align recovery plans with the Paris Agreement and Sustainable Development Goals (SDGs). Time is running out to incorporate green measures into tourism recovery plans and prevent a demand-driven tourism rebound from derailing the green transition. Tourism must immediately address climate change, carbon emissions, pollution, energy and resource efficiency, biodiversity, and ecosystem loss. Focus areas will be decarbonization, climate change adaptation, ecosystem restoration, and inclusiveness. Before the pandemic, rapid and unplanned visitor growth led to economically, socially, and environmentally unbalanced tourism development in a number of countries and destinations. Any additional delay in climate action will significantly increase the risk of irreversible changes to planetary systems, making the next ten years crucial for addressing both the existential threat of climate change and the ecosystem crisis. The energy crisis highlights synergies between the green transition and energy security, as well as the need for the government to support energy efficiency improvements and invest in the capacity of businesses to adapt their energy consumption and transition away from fossil fuels.

Tourism policies to reduce greenhouse gas (GHG) emissions and adapt to climate change are insufficient and must be integrated. Climate change and the degradation of ecosystems are well-known. Climate change has accelerated the irreversible extinction of species in all ecosystems, including land, sea, and freshwater. It damages ecosystem structure and resilience. In climate-resilient development, multidimensional governance prioritizes risk mitigation, equity, and justice. As all stakeholders are involved in the design process, fostering pandemic networks and constructing more integrated governance systems may facilitate the transition of the tourism industry. The pandemic's unprecedented support measures presented an opportunity to strategically support the green transition-prone sectors of the tourism system. Coherent and coordinated action across policy areas is critical to achieving common goals, maximizing positive outcomes for tourism and broader greening measures, and avoiding unintended consequences.

In conclusion, the book has comprehensively explained the importance of three critical areas, namely the tourism ecosystem, green tourism, and sustainability, by organizing the ideas in separate boxes. The box provided an easy-to-understand summary of the ideas. The OECD country profiles were included to allow readers to assess the three critical areas for each OECD member. The organization of the ideas makes it appropriate for class practice, particularly for the current tourism issues.