ANNEX 1 – OECD TOURISM COMMITTEE DRAFT PROGRAMME OF WORK (PWB) FOR 2025-26[1]

1.2.4.1 Monitoring and evaluating evidence-based tourism policies for stronger performance

OECD Tourism Trends and Policies 2026 and database on tourism economics

The demand within governments and the tourism sector for in-depth analysis and robust information on tourism policies, data and issues remains high. The publication OECD Tourism Trends and Policies is an international reference and benchmark on how effectively countries are supporting sustainability, resilience, inclusion, innovation and competitiveness, in tourism. Its sheds light on associated policies and practices, and provides evidence on important economic and social tourism statistics. It provides comparative knowledge through thematic chapters and country-specific policy and statistical profiles. The report covers around 50 OECD and Partner countries.

OECD Tourism Trends and Policies 2026 will bring a forward-looking perspective and new insights on emerging trends and policy reforms. It will include thematic chapters focusing on topical issues of primary importance for policy and/or business decision-makers, and analysis of the latest tourism policy developments. The themes for the thematic chapters will be determined at a later stage by the Tourism Committee. Opportunities to include new and timely data, infographics and visual content will be explored.The country policy profiles will present i) the contribution of tourism to the national economy; ii) how tourism administration is organised and financed; and iii) the key policy initiatives and reforms supporting sustainable tourism development. The country statistical profiles will provide key data on domestic, inbound and outbound tourism, employment, enterprises and internal tourism consumption.

Tourism statistics are collected and processed using the OECD Statistical Information System. All tourism data are accessible online, open and free, through the new SDMX-native OECD Data Explorer. This includes data on domestic, inbound and outbound tourism, enterprises, employment and internal tourism consumption. Building on this statistical environment, the activity will further strengthen tourism data collection and analysis, and improve the timeliness of tourism information. The Working Party on Tourism Statistics will support the statistical agenda of the Tourism Committee.

Improving the evidence-base for tourism policies and sustainable tourism development

Effective tourism policy making, planning and management relies on robust, timely and relevant data to inform policy and business decisions and ensure policies are well targeted and have the desired impact. Recent efforts have focused on better measuring the economic, environment, and social dimensions of tourism to develop timely, robust, and comparable data and indicators to monitor the sustainability of tourism. More progress is needed to meet the policy demand for new, more granular, and more timely data and ensure policy makers have access to the right data at the right time to respond to policy riorities as they emerge, balance trade-offs, and manage tourism sustainably, so the benefits outweigh the costs for host communities, businesses, the environment, and tourists.

This activity will build on work under the current PWB 2023-24 to improve the evidence base for sustainable tourism policies and consider evidence-based approaches to better manage tourism development. It will consider initiatives to use new data sources, indicators, and tools to support and monitor progress towards targeted outcomes, and ensure decision makers can access and use the data

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needed to tackle policy issues. It will explore ways to anticipate and monitor when tourism could reach or surpass optimal levels, with detrimental impacts for the quality of life of residents, the environment, other economic sectors and the tourist experience. It will provide guidance on approaches to using new data sources, and tools to complement existing data sources to improve the timeliness and granularity of tourism data.

Strengthening the relevance and impact of OECD instruments under the responsibility of the Tourism Committee

The OECD has two existing legal instruments on tourism: the Recommendation of the Council on Government Action to Promote Tourism [C(65)85 as amended by C(68)35, OECD/LEGAL/0068] and the Decision-Recommendation of the Council on International Tourism Policy [C(85)165/FINAL as amended by C(86)199/FINAL, OECD/LEGAL/0222]. These instruments are being revised as part of an OECD-wide standard-setting review [C(2016)47/REV1], which aims to ensure that OECD legal instruments continue to respond, in a timely manner, to the new challenges that governments are facing.

This activity will complete the review of the two OECD legal instruments under its responsibility. Following a hiatus in the review which was paused to focus attention and resources on the COVID-19 pandemic response, the Tourism Committee agreed to develop a roadmap to complete this work at the 112th session on 27-28 October 2023 [CFE/TOU/M(2023)2, CFE/TOU(2017)9/REV1]. It is an opportunity for the Tourism Committee to reflect on long-term policy objectives in the post-pandemic global tourism context and develop a revised standard(s) to advance important domestic policy agendas, promote international co-operation, adapt to evolving challenges, and support the development and implementation of evidence-based tourism policies that prioritise a sustainable development agenda in guiding future tourism

1.2.4.2 Supporting sustainable and inclusive tourism development

Optimising the social impacts of tourism

Tourism has a key role to play to foster economic development that creates decent jobs, enhances well-being and social cohesion, and contributes to the shared interests of tourists, residents, and businesses. However, the impacts of tourism are often unbalanced, leading policy makers and local communities to increasingly question the value added and social licence for tourism. More needs to be done to understand the significant social impacts and manage trade-offs to take advantage of the potential for the sector to promote economic development and enhance well-being, social progress and inclusion in traditional and emerging destinations.

This activity will consider ways to optimise the social impacts of tourism for more balanced development. It will develop understanding of the impacts and implications of tourism for the well-being of local communities and the development of liveable destinations, which can be influenced by resident sentiment/acceptance, short term rentals, housing, employment opportunities, gender issues, transport, and infrastructure, among other issues. It will facilitate the sharing of knowledge and exchange of experiences to realise the potential of tourism as a driver of economic development in new and established destinations, while enhancing the quality of life for local communities and tourists. It will explore ways to manage trade-offs between the social and economic impacts, and ensure the benefits (and costs) of tourism are equitably spread and reach local businesses and communities (e.g. strengthening local value chains, supporting SMEs, investment and infrastructure development). It will provide insights on the implications for tourism policy and consider ways to measure and monitor progress on the social and well-being impacts of tourism (e.g. data, indicators, tools).

Core questions include: What are the most pressing social issues associated with tourism development? How to better capture the social values and benefits for the host communities on which tourism depends? What impacts from short term rentals, and what effective approaches to manage? How to manage the trade-offs between economic and social impacts and share the costs of tourism more fairly, including with visitors? How to promote tourism that is accessible and inclusive for visitors and local communities? Do SMEs require particular supports? Do different types of destinations face different issues? How to engage local communities in tourism development? What metrics to measure and monitor socio-economic progress and well-being?

Developing and implementing tourism strategies for sustainable and inclusive outcomes

Countries have made recent progress to embed sustainability principles in tourism strategies and plans which play a key role in mobilising actors around a clear vision and well-articulated objectives. However, implementation is an ongoing challenge to deliver on the agreed actions and achieve desired outcomes. This calls for not only evidence-based policies, but effective management approaches, and governance structures that bring together key actors at all levels. Co-ordinated, forward-looking policy approaches are needed to support this, along with improved capacity of government at all levels.This activity will consider effective approaches to develop and implement tourism strategies toachieve sustainable and inclusive tourism development. It will facilitate knowledge sharing and exchange of experiences for effectively developing and implementing tourism strategies, plans and programmes, and

evaluating the impacts and outcomes to strengthen the performance and impact of tourism strategies and plans in the future. It will consider ways to mobilise actors and improve co-ordination between tourism planning and management structures across levels of government and policy areas. It will explore ways to improve the effectiveness of destination management organisations and local governance structures. It will identify ways to integrate forward-looking approaches (scenario planning, foresight, forecasting etc.) into policy making and strategy development to prepare for the future.Core questions include: What learnings from developing and implementing tourism strategies and plans? What is working well/not so well? How are the roles, responsibilities and expectations of government changing in the post-pandemic context? How to ensure tourism considerations are integrated into decisions in other policy areas? How to co-ordinate across different levels of government? What role for destination management organisations, and how to strengthen local governance structures? What good practices to learn from?

1.2.4.3 Boosting tourism resilience and adapting to major transitions

Seizing the digital trends and new technologies shaping the future of tourism

Digital technologies are fundamentally reshaping tourism and represent a powerful catalyst for innovation in the sector. New technologies (e.g. AI, VR, XR, blockchain) are changing the way tourists plan and experience travel, and present opportunities to not only reach new consumers with novel tourism products and services, but to also improve performance and productivity, and accelerate the transition togreener, more sustainable business models. New technologies are also altering tourism value chains and the position of SMEs within them (e.g. online platforms), and bringing new challenges to be able to level the playing field and ensure businesses of all sizes can keep pace and benefit.

This activity will consider ways to harness the potential of digital trends and new technologies shaping the future of tourism. It will facilitate knowledge sharing and exchange of experiences on emerging digital trends and the use of new technologies to stimulate innovation along the tourism value chain. It will develop understanding of how technological advancements (e.g. AI, VR, XR, blockchain) are impacting the tourism economy, and the associated opportunities and challenges this brings. It will explore ways to

support tourism SMEs to adapt to the rapidly changing technological landscape and use new technologies to innovate and create value (e.g. new business models, data analytics, skills, automation). It will provide insights on the implications for tourism policy and consider ways to measure and monitor progress on the update and use of digital technologies in tourism (e.g. data, indicators, tools).

Core questions include: How are emerging digital trends and new technologies shaping tourism? How to seize the opportunities and mitigate the challenges that AI and other new technologies bring for tourism SMEs? What policies are needed to address gaps on the uptake and use of these new technologies and prepare tourism SMEs and destinations for the digital future? What are the implications for policy? What metrics to measure and monitor progress?

Fostering the transition to a green tourism economy

Momentum is gathering for the sustainable and transformative action needed to transition to a greener tourism economy. Government has a key role to play to convert this momentum into meaningful action, and ensure the sector plays its part in delivering on climate goals. Tourism in turn is also greatly impacted by climate change. Sustainability principles need to be embedded in tourism policies and programmes, with mitigation and adaptation measures along the tourism value chain to translate commitments into real actions and outcomes. Co-ordinated action with other policy areas (e.g. transport, investment, infrastructure, skills) and across levels of government is also required to maximise the positive outcomes for tourism, while minimising unintended consequences.This activity will consider ways to foster the transition to a green tourism economy and support climate action. It will review plans and roadmaps to translate ambitions into concrete actions and consider the impact of different mitigation and adaptation efforts, with a view to identifying areas for improvements.

It will explore policy solutions to increase the contribution of tourism to carbon reduction commitments and promote greener tourism infrastructure, investment, and transport. It will consider ways to support tourism SMEs and destinations to innovate more sustainable business models, practices, and products (e.g. financing, green standards and certification, ESG reporting) and prepare for increased climate impacts in destinations (e.g. coastal, mountain, city). It will provide insights on the implications for tourism policy and consider ways to measure and monitor progress on the environmental impacts of tourism (e.g. data, indicators, tools).

Core questions include: What are the priorities for decarbonising tourism activities and transitioning to greener models of tourism development? What challenges and opportunities for tourism to contribute to net zero ambitions? How to translate these ambitions into concrete actions? What high impact measures to target along the tourism value chain? How to support tourism businesses, destinations and government at all levels to access financing needed to invest in the transition? How do ESG reporting requirements impact tourism businesses? Do SMEs require particular supports? Do different types of destinations face different issues? How to ensure tourism considerations are integrated into decisions in other policy areas? How to co-ordinate across different levels of government? What metrics to measure and monitor progress toward climate goals and shift to greener business models?

Other priorities identified in the draft PWB 2025-26

> *To note: These activities will be funded through Voluntary Contributions distinct from those supporting the overall programme of work of the Tourism Committee.*

Global Forum on Tourism Statistics, Knowledge and Policies

The Global Forum on Tourism Statistics, Knowledge and Policies is a key tool to fulfil the Tourism Committee's Mandate to maximise the economic, social and environmental benefits of tourism. Building on the success of previous Global Fora, it will aim to embrace emerging tourism policy topics and discuss their overarching implications for policy implementation. It will benefit from wider stakeholder engagement, provide higher visibility for the work of the Tourism Committee, and strengthen the Committee's role as an opinion leader on global tourism issues.

Tourism policy supports

Tourism policy supports aim to enhance tourism performance, competitiveness and innovation, to increase knowledge about tourism policy design and evaluation, to diffuse evidence-based lessons and good practices, and to strengthen policy coherence and linkages.

Tourism strategy supports are collaborative, action-oriented projects to support national tourism strategy development and policy reforms through frequent consultation and technical seminars in selected policy areas. OECD works with governments to develop and implement a tourism strategy and reform agenda setting out principles, policies and objectives for action. These projects aim to guide policy choices, build consensus on tourism policy priorities, and promote co-ordinated implementation.

Tourism policy reviews ([Mexico](#), [Italy](#)) provide comprehensive analysis and tailored advice on how to improve the design and implementation of tourism policies, and can be undertaken at the request of national, regional and/or local authorities. The scope and focus of the review is determined with the national/subnational partner, in close consultation with the Tourism Committee.

Thematic policy studies ([Tourism and the Creative Economy](#), [Impact of Culture on Tourism](#)) provide in-depth analysis and concrete recommendations on a policy issue, and contribute to policy coherence by analysing linkages between tourism and other areas. Possible themes include: Promoting sustainable tourism mobility; Review of impacts and policy responses to short term rental accommodation; Role of OTAs in the tourism value chain; Managing risks and preparing for future crises to build tourism resilience; Tourism as a driver of sustainable socio-economic development in Southeast Asia

Tourism policy workshops and dialogues

Tourism policy workshops and dialogues aim to provide policy insights on tourism reforms, strategies and issues high on the tourism policy agenda. They are a platform for discussion and tool to gather best practices, exchange experiences and provide policy insights. The focus and scope of the workshops and dialogues will be identified with the lead partner(s), in close consultation with the Tourism Committee. They will be hosted by Member or Partner countries, or the private sector.

Work may consist of one-off workshops on a specific issue, or a series of workshops to build an ongoing dialogue and co-operation with policy makers and other stakeholders. A dialogue could for instance focus on bringing public and private actors together to share knowledge and exchange on leveraging emerging technologies to strengthen tourism data, including through data sharing and integration to enhance evidence-based decision making for policy and businesses.