OECD Tourism Trends and Policies 2026

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Foreword

OECD Tourism Trends and Policies is an international reference and biennial benchmark to support countries in driving sustainable and competitive tourism growth. The publication brings together internationally comparable data on tourism and highlights good practices and key policy and governance reforms. It also includes several topical and thematic chapters, and country-specific policy and statistical profiles for 53 OECD and partner countries.

The tourism sector has navigated and proven resilient to several shocks in recent years including the pandemic, natural disasters, economic pressures and rising geopolitical tensions, and stands at record levels in many OECD countries. The *2026 edition of OECD Tourism Trends and Policies* comes as the sector's resilience is again being tested by uncertainty and the conflict in the Middle East, which has disrupted global travel flows and pushed up transport and other costs. While the recent signing of the Islamabad Memorandum of Understanding is expected to help restore confidence, the situation remains fragile and travel patterns, at least in the near-term, may continue to be shaped by considerations around safety, potential disruptions, and affordability. These dynamics present challenges for businesses and destinations more broadly, but also potential opportunities as demand adjusts and reconfigures. At the same time, powerful technological, demographic and environmental trends continue to reshape how tourism is developed, managed and experienced.

These structural and contemporaneous dynamics underscore the need for flexible, co-ordinated and whole-of-government approaches, working with businesses and destinations, that reflect tourism's strategic and cross-cutting nature and help reinforce the sector's resilience, by improving its ability to anticipate and adapt to uncertainty. They also underscore the importance of more strategic approaches that seek to balance economic, social and environmental outcomes while strengthening competitiveness and resilience, which many governments are adopting. This is a core thread in this edition of *OECD Tourism Trends and Policies*, which includes dedicated chapters on enhancing the social benefits of tourism and the sector's capacity to adapt to increasingly frequent and severe extreme weather-related events, while strengthening resilience and maintaining competitiveness. The report also highlights how governments and destinations are shifting toward more strategic, data-driven tourism management approaches, supported by renewed national tourism strategies, evolving governance arrangements, greater use of digital tools, and closer co-ordination across policy domains and levels of government to deliver on those goals.

This flagship publication was produced by the Centre for Entrepreneurship, SMEs, Regions and Cities (CFE) of the OECD, with co-financing from the European Union. The OECD Tourism Committee approved Chapter 1 on 17 June 2026, Chapter 2 on 27 May 2026, Chapters 3 and 4 on 3 April 2026, and the Country Profiles on 27 May 2026.

Acknowledgements

This report presents the 2026 edition of the OECD Tourism Trends and Policies publication. It was produced by the OECD Centre for Entrepreneurship, SMEs, Regions and Cities (CFE), led by Lamia Kamal-Chaoui, Director, as part of the programme of work of the OECD Tourism Committee. The report was undertaken in co-operation with the European Union*.

The report benefitted from significant contributions, feedback and guidance from policymakers and statisticians from OECD and partner countries. It also benefitted from consultation and feedback from intergovernmental organisations, including UN Tourism and the International Labour Organization, as well as industry representatives and associations, including Business at OECD. Discussions at two virtual workshops informed the preparation of Chapter 3 on *Optimising the social impacts of tourism* and Chapter 4 on *Preparing tourism for extreme weather-related events*.

The report was co-ordinated and edited by Jane Stacey, Head of the Tourism Policy and Analysis Unit, under the supervision of Nadim Ahmad, Deputy Director (CFE). From CFE: Julie Reimann, Economist authored Chapter 3, co-authored Chapter 2, managed the preparation of country policy profiles and undertook substantial co-ordination, drafting and editing; Peter Haxton, Senior Policy Analyst, co-authored Chapter 4 and provided support in drafting and editing; Brendan Irish, Research and Data Officer co-authored Chapter 1, managed the statistical database, and developed the country statistical profiles and synthesis tables; Doyeon Kwon, Senior Policy Analyst, Christina Gay, Policy Analyst and Issa Torres, Policy Analyst, provided support in drafting and editing; Monserrat Fonbonnat, provided administrative support and undertook substantial co-ordination; and Jack Waters and Bridgette Joyce served as publication co-ordinators. The statistical component of the report is available via the OECD's statistical online platform – OECD Data Explorer.

Kristen Corrie (*Consultant*) co-authored Chapter 2 and the country profiles, and Robert Steiger (*University of Innsbruck*) co-authored Chapter 4. In addition, the report benefitted from contributions and feedback from other colleagues in the OECD Centre for Entrepreneurship, SMEs, Regions and Cities (CFE) and the OECD Environment Directorate (ENV).

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Reader's guide

This reader's guide provides information and methodological notes on the data sources used in this book: International Recommendations for Tourism Statistics 2008, Tourism Satellite Account: Recommended Methodological Framework 2008 and Balance of Payments and International Investment Position Manual.

The statistical data, metadata and sources in this report are accessible online in a single, consolidated source of tourism statistics OECD Tourism Statistics. Individual data sets can be accessed through the following links: Domestic tourism, Enterprises and employment in tourism, Inbound tourism, Internal tourism consumption, Key tourism economic indicators, Outbound tourism and Receipts and expenditure.

The data closely align with the main methodological references and international standards used for tourism statistics:

- International Recommendations for Tourism Statistics 2008, UN/UNWTO, *http://unstats.un.org/unsd/publication/SeriesM/seriesm_83rev1e.pdf*.
- Tourism Satellite Account: Recommended Methodological Framework 2008, UN/UNWTO/EUROSTAT/OECD, *http://unstats.un.org/unsd/publication/Seriesf/SeriesF_80rev1e.pdf*.
- Seventh Edition of the IMF's Balance of Payments and International Investment Position Manual 2025, IMF, *https://www.imf.org/-/media/files/data/statistics/bpm6/draft-bpm7-wcv.pdf.*

This note provides the reader with a methodological summary. For more detailed information, please refer to the above-mentioned methodological tools.

International Recommendations for Tourism Statistics (IRTS)

The International Recommendations on Tourism Statistics (IRTS) provides a common reference framework for countries to use in the compilation of tourism statistics. It presents an internally consistent system of definitions, concepts, classifications and indicators, and provides general guidance with respect to data sources and data compilation methods.

Tourism can be regarded as a social, cultural and economic phenomenon related to the movement of people outside their usual place of residence. Tourism refers to the activity of visitors.

A **visitor** is a traveller taking a trip to a main destination outside his/her usual environment, for less than a year, for any main purpose (business, leisure or other personal purpose) other than to be employed in the country or place visited.

A visitor is a **tourist** if his/her trip includes an overnight stay; otherwise, a visitor is classified as a **same-day visitor** (or excursionist).

Three basic forms of tourism can be distinguished:

- **Domestic tourism** comprises the activities of a resident visitor within the country of reference.
- **Inbound tourism** comprises the activities of a non-resident visitor within the country of reference.
- **Outbound tourism** comprises the activities of a resident visitor outside the country of reference.

Measuring the flows of visitors: both arrivals and nights are used to assess the flows of visitors. A distinction is made between arrivals at borders and in accommodation, and nights spent in accommodation. As far as overnight tourism is concerned, accommodation statistics are an important statistical source of information on domestic and inbound visitors.

Tourism Satellite Account: Recommended Methodological Framework (TSA:RMF)

The Tourism Satellite Account (TSA) is a conceptual framework for the economic measurement of tourism in its different components (domestic, inbound and outbound). It also highlights the relationship between consumption by visitors and the supply of goods and services in the economy, principally those from tourism industries. With this instrument, it is possible to estimate tourism GDP, establish the direct contribution of tourism to the economy and develop further analyses using the links between the TSA, the System of National Accounts and the Balance of Payments.

Tourism characteristic products and activities

The TSA reconciles tourism data related with supply and demand. Tourism measurement and analysis therefore require a classification of products, mainly those belonging to tourism expenditure, and productive activities that are the basis for defining tourism industries. Tourism characteristic activities are those that typically produce **tourism characteristic products**. A **tourism industry** represents the grouping of those establishments whose main activity is the same tourism characteristic activity.

The IRTS 2008 and the TSA-RMF 2008 provide the typology of tourism characteristic consumption products and activities (tourism industries):

Tourism characteristic consumption products	Tourism characteristic activities (tourism industries)
Accommodation services for visitors	Accommodation for visitors
Food- and beverage-serving services	Food- and beverage-serving activities
Railway passenger transport services	Railway passenger transport
Road passenger transport services	Road passenger transport
Water passenger transport services	Water passenger transport
Air passenger transport services	Air passenger transport
Transport equipment rental services	Transport equipment rental
Travel agencies and other reservation services	Travel agencies and other reservation services activities
Cultural services	Cultural activities
Sports and recreational services	Sports and recreational activities
Country-specific tourism characteristic goods	Retail trade of country-specific tourism characteristic goods
Country-specific tourism characteristic services	Other country-specific tourism characteristic activities

Note: for detailed information on the coverage, please see annexes 2 and 3 of the IRTS 2008.

Internal tourism consumption

The TSA Framework makes a distinction between tourism expenditure and tourism consumption. Tourism expenditure refers to monetary transactions, whereas tourism consumption also includes other transactions: services associated with vacation accommodation on own account, tourism social transfers in kind and other imputed consumption. However, the latter transactions have to be separately evaluated. Therefore, the data might refer to either consumption or expenditure, depending on the country.

Three forms of consumption are distinguished:

- **Domestic tourism consumption**: the tourism consumption of a resident visitor within the economy of reference.
- **Inbound tourism consumption**: the tourism consumption of a non-resident visitor within the economy of reference.
- **Internal tourism consumption**: the tourism consumption of both resident and non-resident visitors within the economy of reference. It is the sum of domestic tourism consumption and inbound tourism consumption.

Tourism Direct Gross Domestic Product and other aggregates

The Gross Domestic Product (GDP) of an economy is defined as the sum of the gross value added generated by all industries. Tourism GDP corresponds to the part of GDP generated by all industries in response to internal tourism consumption. A further distinction must be made between direct tourism GDP and indirect tourism GDP. Put simply, **tourism direct GDP** reflects the direct value-added generated by industries directly in contact with visitors, while indirect tourism GDP reflects all of the upstream value-added- generated by industries supplying inputs to industries directly in contact with the visitors. The TSA Framework limits its recommendations to the evaluation of direct tourism GDP. The evaluation of indirect tourism GDP would require the use of input-output techniques or adjustments (for imports) of expenditure-based measures.

Domestic, inbound and outbound tourism

A variety of different data sources are used to measure flows of visitors. Data can be collected directly from individuals about their tourism trips. These 'demand-side' sources include visitor or border surveys to measure inbound tourism flows, and resident travel or household surveys to measure domestic and outbound tourism flows. These surveys feed into the tourism consumption (i.e. demand) tables of the TSA (Tables 1-4). Data on domestic and inbound visitors can also be collected from accommodation providers ('supply-side').

Data from tourism demand surveys are presented in the country profile statistical tables. In the absence of data from these sources, or where data gaps exist, data from accommodation surveys are published.

For more detailed information on the data sources for individual countries, please refer to relevant datasets and metadata in the online tourism database OECD Tourism Statistics.

Balance of Payments and International Investment Position Manual – Sixth Edition

The following items of the Balance of Payments are used to assess the monetary flows of visitors.

Travel

Travel credits (**international travel receipts**) cover goods and services for own use or to give away acquired from an economy by non-residents during visits to that economy. Travel debits (**international travel expenditure**) cover goods and services for own use or to give away acquired from other economies by residents during visits to these other economies.

The goods and services may be purchased by the persons concerned or by another party on their behalf (e.g. business travel). The standard component breakdown of travel is between business and personal travel. *Business travel* covers goods and services acquired for personal use by persons whose primary purpose of travel is for business. *Personal travel* covers goods and services acquired by persons going abroad for purposes other than business, such as vacations, participation in recreational and cultural activities, visits with friends and relatives, pilgrimage, and education- and health-related purposes. This breakdown allows for closer links with tourism satellite accounts as well as supply and use tables.

Passenger services

Passenger services cover the transport of people. This category covers all services provided in the international transport of non-residents by resident carriers (credit or **international passenger transport**

receipts) and that of residents by non-resident carriers (debit or **international passenger transport expenditure**). Passenger services include fares and other expenditure related to the carriage of passengers, any taxes levied on passenger services, and fares that are a part of package tours, cruise fares, rentals, charters, and leases of vessels, aircraft, coaches, or other commercial vehicles with crews for the carriage of passengers.

Other issues

Enterprises in tourism: An establishment is an enterprise or part of an enterprise that is situated in a single location and in which only a single productive activity is carried out or in which the principal productive activity accounts for most of the value added. For the purposes of comparability across countries, unless otherwise stated, all statistics for enterprises refer to establishments.

Employment in tourism: data on employment refer to people or jobs. In the case of people, the data refer to employees only or to employees and self-employed people (employed people). Full-time equivalent employment is the number of full-time equivalent jobs, defined as total hours worked divided by average annual hours worked in full-time jobs.

Data expressed in US dollar terms: for some tables, national currency data have been converted to US dollar data. Exchanges rates are collected from the OECD database.

Metadata and sources

The majority of the data used in this publication is submitted by countries. All the detailed metadata and sources can be found under the right-hand side information panel in the on-line OECD database at OECD Tourism Statistics.

Country coverage

The OECD Member countries are: Australia, Austria, Belgium, Canada, Chile, Colombia, Costa Rica, Czechia, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Israel, Italy, Japan, Korea, Latvia, Lithuania, Luxembourg, Mexico, the Netherlands, New Zealand, Norway, Poland, Portugal, the Slovak Republic, Slovenia, Spain, Sweden, Switzerland, Türkiye, the United Kingdom and the United States.

Other Partner countries covered in this report are: Argentina, Brazil, Bulgaria, Croatia, Egypt, Indonesia, Malta, Montenegro, Morocco, Peru, Romania, Saudi Arabia, Serbia, South Africa and Thailand.

Codes used for currencies

- ARS Argentinian Peso
- AUD Australian Dollar
- BGN Bulgarian Lev
- BRL Brazilian Real
- CAD Canadian Dollar
- CHF Swiss Franc
- CLP Chilean Peso
- COP Colombian Peso

- CRC Costa Rican Colon
- CZK Czech Koruna
- DKK Danish Krone
- EGP Egyptian Pound
- EUR Euro (Austria, Belgium, Bulgaria, Croatia, Estonia, Finland, France, Germany, Greece, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Montenegro, Netherlands, Portugal, Slovak Republic, Slovenia, Spain)
- GBP United Kingdom Pound Sterling
- HUF Hungarian Forint
- IDR Indonesian Rupiah
- ILS Israeli Shequel
- ISK Iceland Krona
- JPY Japanese Yen
- KRW Korean Won
- MAD Moroccan Dirham
- MXN Mexican Peso
- NOK Norwegian Krone
- NZD New Zealand Dollar
- PEN Peruvian Sol
- PLN Polish Zloty
- RON Romanian Leu
- RSD Serbian Dinar
- SAR Saudi Riyal
- SEK Swedish Krona
- THB Thai Baht
- TRY Turkish Lira
- USD United States Dollar
- ZAR South African Rand

Symbols for missing data and abbreviations

These symbols are used in the country tables:

B Break in series

.. Data is not available

E Estimated data or data based on the use of a limited amount of data

P Provisional

In some cases, due to rounding and specifics of electronic data processing technologies, slight discrepancies may occur between totals and sums of components in those tables that are based on survey information

Data Download

To download the data in this report, click the StatLinks.

To access further data and/or other tourism indicators, please visit the OECD Data Explorer: https://dataexplorer.oecd.org/.

Data cut-off for the print publication 17/06/2026. Please note that the Data Explorer contains the most recent data.

Executive summary

Tourism has proven resilient in recent years, reaffirming its role as a driver of economic growth despite rising uncertainty. However, economic and geopolitical tensions, including the conflict in the Middle East, are putting new pressures on the sector, while structural shifts continue to reshape how it is developed, managed and experienced. Flexible, anticipatory and co-ordinated policies are needed for a sustainable, resilient and competitive future.

Tourism resilience being tested by uncertainty

Strong demand has pushed tourism to record levels in many OECD countries in recent years, reinforcing its economic significance. International tourist arrivals to OECD countries rose by 8.1% to 819.5 million in 2024, surpassing pre-pandemic levels, and the sector directly contributed 4.0% of GDP and 19.3% of services exports, while generating extensive upstream spillovers across transport, retail, agriculture and other sectors. Growth continued through 2025 with international arrivals rising by an estimated 3.4%.

Positive momentum was, however, disrupted in early 2026 by the conflict in the Middle East. Travel to the region, and destinations reliant on the Gulf aviation hubs, have been most affected. The Islamabad Memorandum of Understanding is expected to help restore confidence, but the situation remains fragile, and travel patterns, particularly in the near term, may continue to be shaped by considerations around safety, potential disruptions, and affordability.

Longer term impacts are uncertain. While long-term demand overall remains strong, businesses and destinations need to be prepared to meet challenges and take advantage of opportunities that may emerge from potential shifts in demand. Reinforcing policy frameworks to manage tourism growth and strengthen crisis preparedness will be key, not only to geopolitical shocks but also to increasingly frequent extreme weather-related events and local pressures, to better account for impacts on and benefits to host communities.

Evolving priorities support competitiveness, sustainability and resilience

Governments are increasingly rethinking tourism development and management, adopting more strategic approaches to balance economic, social and environmental outcomes while strengthening competitiveness and resilience. Concentrated visitor flows are placing pressure on infrastructure and communities in some destinations, while less-visited destinations miss out on tourism benefits. At the same time, rising risks from extreme weather-related events are increasing operational and safety pressures, reshaping tourism demand and creating both challenges and opportunities.

Tourism success is increasingly defined by the sector’s ability to generate sustained economic value through enhanced resilience, environmental sustainability and positive outcomes for local communities. Strategic approaches to manage tourism, supported by governance frameworks designed to improve co-ordination across policy areas and between levels of government are increasingly being adopted, alongside an emphasis on environmental stewardship, community engagement and visitor management.

Digitalisation and advances in artificial intelligence are creating new opportunities to improve tourism management, boost operational efficiency and deliver more personalised experiences. At the same time, governments are strengthening tourism data systems and digital tools to provide more timely, granular and reliable data, making data-driven approaches increasingly central to policy design and implementation.

Translating these strategic shifts into practice requires a stronger enabling environment for tourism businesses. This includes streamlining regulation, improving access to finance, investing in skills, and supporting digital and sustainable transitions. Reliable transport systems remain essential to improving connectivity and the visitor experience, while improving accessibility and participation can deliver wide-reaching benefits for regions and communities.

Against this backdrop, more co-ordinated, flexible and whole-of-government policy approaches are needed to navigate uncertainty, address structural imbalances, harness digital and AI opportunities, accelerate environmental action, and share tourism benefits more widely. Building a more competitive and resilient tourism sector will require targeted investment and stronger policy alignment to support SMEs, modernise infrastructure, improve connectivity, and deliver more sustainable outcomes.

Key policy priorities

Co-ordinate national-local policies and empower destinations to manage tourism

- Strengthen co-ordinated multi-level governance to align national and local action, embedding whole-of-government approaches and empowering destinations within a clear strategic framework.
- Shift to value-based tourism models by prioritising sustainability and resilience, actively managing visitor flows and integrating social and environmental considerations into tourism planning.
- Invest in data, digitalisation and AI to support timely, granular and shared insights that support better destination management and evidence-based decision-making.
- Improve the enabling environment for tourism businesses by reducing regulatory burdens, expanding access to finance and skills, and supporting innovation and digital uptake.

Enhance the social benefits of tourism for destinations and communities

- Strengthen destination governance to align national and destination priorities, empower local communities, and tailor tourism development to the local context, capacity and needs.
- Manage tourism growth to balance benefits and pressures by spreading visitor flows to prepared areas, investing in shared infrastructure and integrating tourism into wider regional development.
- Maximise benefits of tourism for host communities by supporting local businesses, promoting local value creation and encouraging economic diversification through integrated, cross-sector policies.

Adapt tourism to extreme weather-related events

- Embed risk assessment, early warning systems and crisis response into tourism planning to better anticipate and respond to more frequent and intense extreme weather-related events.
- Promote investment in resilient tourism infrastructure to withstand extreme weather, including nature-based solutions, to reduce vulnerability and strengthen the sector’s long-term resilience.
- Build adaptative capacity of policymakers and businesses by promoting the skills and knowledge needed to assess risks, prioritise actions and implement effective adaptation strategies.

Chapter 1. Tourism trends, performance and outlook

Tourism has shown notable resilience in recent years, reaffirming its role as a key driver of economic growth even as it operates in an increasingly uncertain environment. Heightened economic and geopolitical uncertainty, including the evolving conflict in the Middle East, together with powerful technological and structural trends are reshaping how tourism is developed, managed and experienced. This chapter provides an overview of recent tourism performance and examines the key trends, challenges and opportunities shaping the outlook for the sector, setting the scene for the policy analysis in the subsequent chapters.

Tourism resilience being tested by uncertainty

Tourism has navigated and been resilient to several shocks and pressures in recent years, reaffirming its importance as a driver of economic growth and development. Its extensive cross-sectoral footprint places the sector at the centre of national and sub-national policy agendas, from transport, trade and investment to entrepreneurship and regional development. At the same time, heightened economic, geopolitical and environmental uncertainty alongside rapid digital, demographic and social change is exposing structural vulnerabilities and reshaping how tourism is developed, managed and experienced. These dynamics underscore the need for flexible, co-ordinated and whole-of-government approaches that reflect tourism's strategic and cross-cutting nature, to build a sustainable, resilient and competitive tourism economy.

The evolving conflict in the Middle East has disrupted global travel flows and tested the resilience of tourism. Air services through the strategic aviation hubs in the Gulf region have been severely restricted, with commercial flights significantly lower than prior to the conflict. Energy prices soared, putting pressure on airfares and transport costs, while tightening jet fuel markets and longer flight paths also resulted in flight cancellations (OECD, 2026[1]). Tourism businesses more widely are experiencing higher operating costs, linked with higher energy costs, as well as the increased administrative burden of managing operational changes and flexible itineraries. These dynamics are leading to shifts in visitor flows, with some destinations experiencing declines while others benefit.

The recent signing of the Islamabad Memorandum of Understanding is expected to help restore confidence; however, the situation remains fragile at the time of finalising this report. Travel patterns, particularly in the near term, may continue to be shaped by considerations around safety, potential disruptions, and affordability, while any renewed instability could lead to more sustained and widespread impacts. These dynamics present ongoing challenges for businesses and destinations, while also, in some cases, creating potential opportunities as demand shifts.

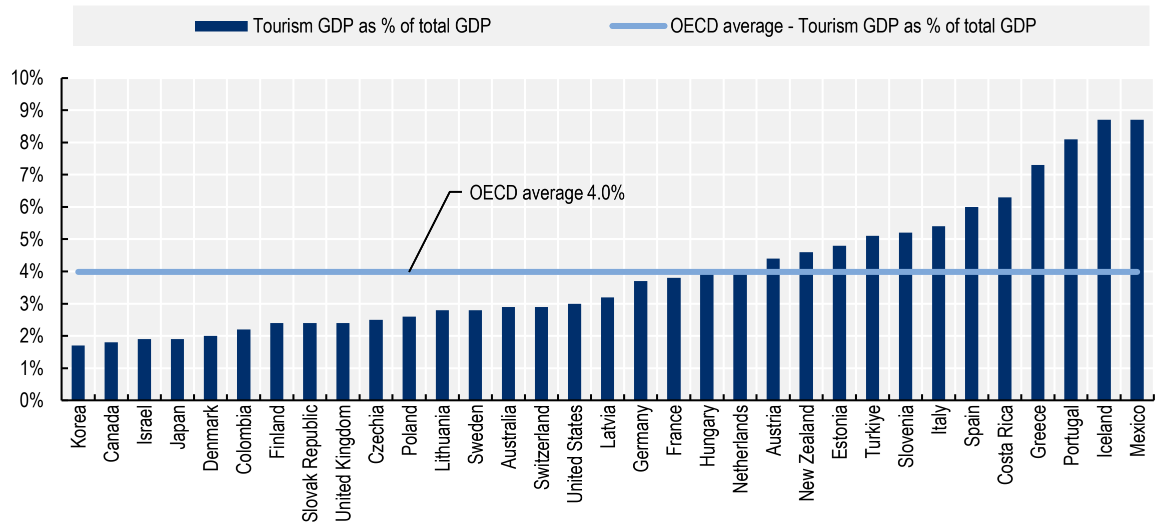
Strong performance has sustained tourism's economic role

Strong performance has continued to underpin tourism's economic value and importance in recent years. Tourism directly accounts for 4.0% of GDP (Figure 1.1), 6.3% of employment (Figure 1.2) and generated 19.3% of service-related exports (Figure 1.3), on average in OECD countries. This reflects the strong recovery and performance in recent years, reinforcing tourism's role in the economy. While these figures remain slightly below pre-pandemic levels (4.4% of GDP, 6.6% of employment and 22.0% of service exports), they in turn highlight that while tourism is vulnerable to disruption, the sector continues to demonstrate a notable ability to bounce back from shocks and provide economic gains, including in periods of heightened uncertainty. These figures also highlight the relative weight of tourism in OECD economies, compared with sectors such as mining (1.5% of GDP), agriculture[1] (1.6%), construction (5.1%) and information and communication (6.1%) (OECD, 2026[2]).

The significant indirect and cross-sectoral impacts of tourism mean the sector can be strategically leveraged to promote economic growth and development. Tourism generates extensive spillovers across a wide range of sectors, including transport, retail and agriculture, amplifying its contribution beyond direct impacts. Tourism demand stimulates local supply chains and supports employment across both urban and rural areas, including for small and medium-sized enterprises. Moreover, tourism investment can catalyse infrastructure development and improve public services that benefit residents as well as visitors. When effectively integrated into broader policy frameworks, tourism can act as a lever for diversification, regional development, and economic growth.

Figure 1.1. Contribution of tourism to GDP in OECD countries

In percentage for selected OECD countries, latest available year, 2023 or 2024

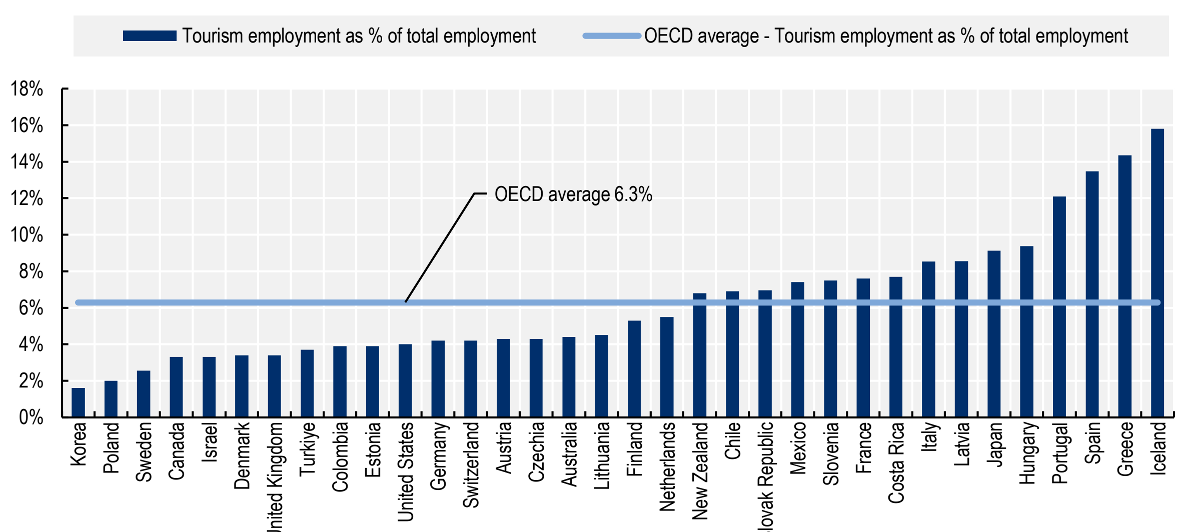


Note: Tourism direct GDP is the preferred indicator. GDP refers to GVA for Canada, Colombia, Finland, Germany, Greece, Hungary, Israel, Italy, Latvia, Lithuania, Mexico, Netherlands, New Zealand, Portugal, Switzerland, Türkiye, United Kingdom and United States.
Only countries with 2023 or 2024 data shown.
Source: OECD Tourism Statistics (Database), Country Profiles.

StatLink https://stat.link/7v2zb6

Figure 1.2. Contribution of tourism to employment in OECD countries

In percentage for selected OECD countries, latest available year, 2023 or 2024

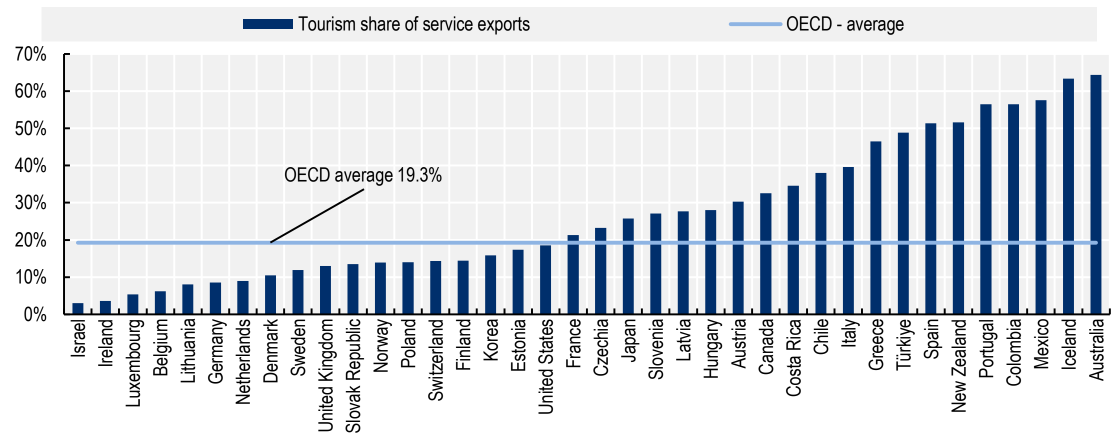


Note: Only countries with 2023 or 2024 data shown.
Source: OECD Tourism Statistics (Database), Country Profiles.

StatLink https://stat.link/0mlpgu

Figure 1.3. Contribution of tourism to service exports in OECD countries

Tourism receipts as a share of total service exports, 2024



Note: Data for Belgium, Germany, Lithuania, New Zealand, Norway, Türkiye, United Kingdom and United States excludes passenger transport.
Source: OECD Tourism Statistics (Database).

StatLink https://stat.link/xw1g4k

Tourism is a significant contributor to export-led growth, with international visitor spending a major source of service exports for many economies. Travel exports totalled USD 1.1 trillion in OECD countries in 2024, excluding passenger transport (Table 1.1). This represents an 8.4% increase on 2023 levels in constant prices, with OECD countries accounting for 63.14% of global travel receipts (exports) and 53.0% of global travel expenditures (imports) (compared to 59.0% and 49.6% in 2019). Preliminary estimates by UN Tourism show that globally international tourism receipts reached USD 1.9 trillion in 2025, a 4% increase from 2024 (UN Tourism, 2026[3]).

Almost two thirds of OECD countries recorded a positive travel balance in 2024, led by Spain (USD 73.8 billion), Türkiye (USD 48.9 billion) and Japan (USD 40.4 billion). Japan experienced the highest growth rate in travel exports between 2023 and 2024 (up 37.6% in constant prices), due to strong growth in inbound arrivals (up 47.1%) driven by a depreciation in the yen and recovery in the Chinese market, which has more recently softened. Other countries recording strong performances include Chile (up 29.6% in constant prices), Norway (22.4%) and New Zealand (17.2%). Performance was weaker in Israel (down 58.0%) and Poland (down 9.0%). A breakdown of international travel receipts (exports), expenditure (imports) and the travel balance in OECD member countries and selected partner economies is provided in (Table 1.1).

Tourism exports generate value added through both direct and indirect channels, extending well beyond the initial spending of international visitors. Pre-pandemic estimates indicate that on average across OECD countries, for every 1 USD of direct value added generated by tourism, an additional 61 cents of indirect value added is generated in upstream industries (OECD, 2019[4]), based on data from the OECD Trade in Value Added (TiVA) database, using non-resident expenditure as a proxy for tourism expenditure. This highlights the extensive linkages between tourism and other sectors including agriculture, construction and transport. Tourism exports also facilitate market access for local products and services, supporting export diversification and deeper integration into global value chains. Together, these effects highlight tourism's broad-based contribution to value added and its role as an engine of economy-wide activity.

Table 1.1. International travel receipts and expenditure in OECD and partner countries, 2019, 2023, 2024

Million USD

	Travel receipts			Travel expenditure			Travel balance		
	2019	2023	2024	2019	2023	2024	2019	2023	2024
Australia	45 522	46 126	51 807	35 299	42 371	45 593	10 223	3 755	6 214
Austria	22 941	24 655	26 304	11 602	15 216	16 704	11 339	9 440	9 600
Belgium	9 941	9 603	9 407	20 338	23 337	26 847	- 10 397	- 13 734	- 17 440
Canada	29 807	44 752	51 379	35 349	39 266	43 385	- 5 543	5 486	7 994
Chile	2 303	2 422	3 231	2 459	3 086	3 345	- 157	- 664	- 114
Colombia	5 682	7 557	8 699	4 935	4 950	6 051	747	2 607	2 648
Costa Rica	3 988	4 768	5 453	1 036	1 676	1 900	2 953	3 092	3 553
Czechia	7 643	7 778	9 126	5 889	7 469	8 804	1 755	309	322
Denmark	8 520	10 450	11 263	10 341	11 444	12 257	- 1 821	- 994	- 994
Estonia	1 738	1 447	1 632	1 546	1 347	1 501	192	100	132
Finland	5 094	4 065	4 159	5 680	5 795	6 172	- 587	- 1 730	- 2 013
France	63 508	71 210	76 965	50 542	55 975	59 773	12 966	15 235	17 192
Germany	41 806	37 837	40 108	93 243	115 444	116 778	- 51 438	- 77 607	- 76 670
Greece	20 351	22 267	23 371	3 072	2 629	3 036	17 279	19 638	20 335
Hungary	7 298	7 878	8 054	2 749	3 771	4 319	4 548	4 107	3 736
Iceland	2 695	3 120	3 246	1 510	1 632	1 796	1 185	1 489	1 451
Ireland	6 478	7 549	7 854	8 256	13 212	14 155	- 1 778	- 5 663	- 6 302
Israel	6 737	5 220	2 256	8 153	10 202	8 670	- 1 416	- 4 982	- 6 414
Italy	49 595	55 888	58 680	30 338	34 152	35 725	19 257	21 736	22 955
Japan	46 054	38 587	54 673	21 265	12 740	14 260	24 790	25 847	40 413
Korea	20 867	15 294	16 717	32 739	27 634	29 219	- 11 872	- 12 339	- 12 502
Latvia	1 015	1 276	1 373	749	1 293	1 341	267	- 17	31
Lithuania	1 493	1 700	1 961	1 389	1 662	2 057	104	39	- 96
Luxembourg	5 333	6 840	7 489	3 608	5 080	5 555	1 725	1 760	1 934
Mexico	24 573	30 694	32 956	9 881	9 254	11 325	14 692	21 441	21 632
Netherlands	19 729	21 645	23 698	23 124	22 415	24 949	- 3 394	- 770	- 1 251
New Zealand	10 533	7 930	9 565	4 300	4 047	4 468	6 233	3 884	5 097
Norway	5 855	6 196	7 810	16 513	18 114	18 230	- 10 658	- 11 918	- 10 420
Poland	14 029	15 019	14 071	9 400	10 310	11 679	4 629	4 709	2 391
Portugal	20 522	27 540	30 006	5 736	6 901	7 410	14 786	20 639	22 596
Slovak Republic	3 203	1 600	1 698	2 589	2 322	2 593	614	- 722	- 895
Slovenia	3 183	3 572	3 614	1 679	2 633	2 753	1 504	939	861
Spain	79 670	91 988	106 501	27 778	28 410	32 693	51 892	63 578	73 808
Sweden	9 196	9 920	10 709	14 358	13 746	13 993	- 5 162	- 3 826	- 3 284
Switzerland	17 173	21 427	22 320	17 941	19 555	21 493	- 767	1 872	827
Türkiye		49 456	56 278		7 901	7 372		41 555	48 906
United Kingdom	60 637	73 369	84 463	86 605	99 904	119 196	- 25 967	- 26 536	- 34 734
United States	198 982	189 891	213 779	131 990	157 580	178 914	66 992	32 311	34 865
Argentina	5 241	5 486	4 960	7 850	7 306	7 805	- 2 610	- 1 820	- 2 845
Brazil	5 995	6 907	7 341	17 593	17 948	19 671	- 11 599	- 11 040	- 12 330
Bulgaria	4 276	4 130	4 312	1 732	1 768	2 012	2 544	2 362	2 300
Croatia	11 990	15 784	16 241	1 792	1 943	2 610	10 198	13 841	13 631
Egypt	13 030	14 077	15 336	3 518	5 195	4 064	9 512	8 882	11 272
Indonesia	16 911	14 001	16 703	11 308	11 683	13 459	5 603	2 318	3 245
Malta	1 883	2 148	2 672	530	598	675	1 354	1 549	1 997
Montenegro	1 225	1 637	1 592	58	76	93	1 167	1 561	1 499

	Travel receipts			Travel expenditure			Travel balance		
	2019	2023	2024	2019	2023	2024	2019	2023	2024
Morocco	8 187	10 631	11 537	2 176	2 654	2 955	6 010	7 977	8 581
Peru	3 738	2 765	3 676	2 765	3 304	3 512	973	- 539	164
Romania	3 578	5 379	5 711	6 001	9 375	9 657	- 2 424	- 3 996	- 3 946
Saudi Arabia	16 431	35 989	40 963	15 140	23 677	27 562	1 292	12 312	13 401
Serbia	1 604	2 751	3 054	1 806	3 320	4 099	- 201	- 569	- 1 045
South Africa	8 390	5 681	6 373	3 141	2 432	2 544	5 249	3 249	3 830
Thailand	59 810	30 650	42 276	12 355	12 200	15 923	47 455	18 450	26 353
EU27	427 102	472 814	510 996	345 746	400 156	428 187			
OECD	883 695	988 537	1 102 672	743 980	844 475	926 312			
World[1]	1 499 000	1 546 000	1 748 000	1 499 000	1 546 000	1 748 000			

Note: For more information, please see the country profiles.
1. UN Tourism Data (World Tourism Barometer, Statistical Annex, May 2026)
Source: OECD Tourism Statistics (Database), (IMF, 2026).

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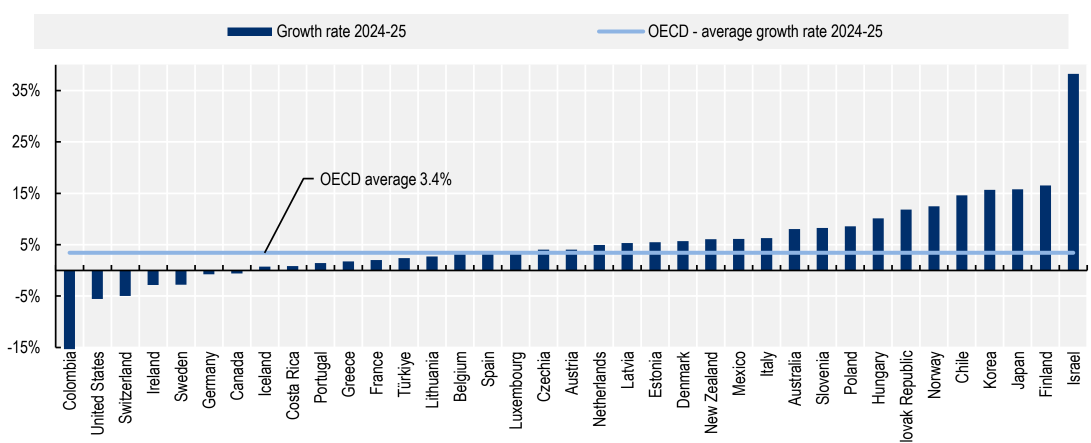
These solid economic results are driven in large part by the restoration of international tourism demand, though the pace and extent of the rebound vary across countries. Overall, international tourist arrivals in OECD countries increased by 8.1% in 2024, surpassing pre-pandemic levels to reach 819.5 million tourists (Table 1.2) and representing 56.1% of international tourist arrivals globally (slightly above the pre-pandemic share of 55.0%). This aligns with previous OECD projections (OECD, 2024[5]). This positive trend continued through 2025 (Figure 1.4), with the OECD estimating that international tourist arrivals in OECD countries increased by 3.4%, slightly below the 5% growth in global arrivals (UN Tourism, 2026[3]).

Figure 1.4. International tourist arrivals in OECD countries

Percentage change in international arrivals from 2024 to 2025, OECD countries



Note: Data for Austria, Belgium, Czechia, Finland, Germany, Greece, Latvia, Luxembourg, Netherlands, Norway, Portugal, Slovak Republic, Slovenia, Sweden and Switzerland is from supply side surveys.
Data for France is an estimate by Atout France.
Data for Greece, Portugal and Switzerland are estimates by OECD.
Source: OECD Tourism Statistics (Database).

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Table 1.2. International tourist arrivals in OECD and partner countries, 2019, 2023, 2024, 2025

	Type of indicator	2019	2023	2024	2025	Change 2019-2025	Change 2024-2025
Australia	Visitors	9 465 900	7 187 400	8 270 900	8 937 390	-6%	8%
Austria[1]	Tourists	31 883 731	30 910 333	32 195 289	33 500 664	5%	4%
Belgium[1]	Tourists	6 800 455	6 445 501	6 627 533	6 830 100	0%	3%
Canada	Tourists	22 145 406	18 344 209	19 912 926	19 787 700	-11%	-1%
Chile	Tourists	4 517 962	3 730 507	5 239 233	6 004 567	33%	15%
Colombia	Visitors	4 130 762	6 170 215	7 071 459	5 988 482	45%	-15%
Costa Rica	Tourists	3 139 008	2 751 134	2 919 483	2 943 991	-6%	1%
Czechia[1]	Tourists	10 890 500	9 558 930	10 477 528	10 900 263	0%	4%
Denmark	Tourists	7 415 728	7 964 198	8 528 144	9 012 635	22%	6%
Estonia	Tourists	3 336 301	2 422 072	2 656 590	2 802 143	-16%	5%
Finland[1]	Tourists	3 290 238	2 560 523	2 903 960	3 383 454	3%	17%
France[2]	Tourists	90 900 000	98 000 000	100 000 000	102 000 000	12%	2%
Germany[1]	Tourists	39 441 607	34 711 761	37 419 799	37 134 349	-6%	-1%
Greece[1,3]	Tourists	25 038 500	26 276 571	27 376 639	27 858 064	11%	2%
Hungary	Tourists	15 948 919	12 162 844	12 344 754	13 593 000	-15%	10%
Iceland	Tourists	2 013 190	2 235 360	2 279 865	2 297 121	14%	1%
Ireland	Tourists	9 353 000	6 257 300	6 591 600	6 404 500	-32%	-3%
Israel	Tourists	4 551 600	3 010 300	961 300	1 329 000	-71%	38%
Italy	Tourists	64 512 919	57 249 682	57 725 148	61 335 543	-5%	6%
Japan	Visitors	31 882 049	25 066 350	36 870 148	42 683 837	34%	16%
Korea	Visitors	17 502 756	11 031 665	16 369 629	18 936 562	8%	16%
Latvia[1]	Tourists	1 945 919	1 388 972	1 587 158	1 671 844	-14%	5%
Lithuania	Tourists	2 874 900	2 404 700	2 383 300	2 447 500	-15%	3%
Luxembourg[1]	Tourists	1 186 374	1 258 072	1 364 853	1 413 750	19%	4%
Mexico	Tourists	45 024 453	41 949 428	45 038 754	47 786 706	6%	6%
Netherlands[1]	Tourists	20 129 000	20 303 590	21 277 000	22 324 000	11%	5%
New Zealand	Tourists	3 702 188	2 827 557	3 175 839	3 369 175	-9%	6%
Norway[1]	Tourists	5 879 307	5 951 367	6 670 410	7 501 402	28%	12%
Poland	Tourists	21 158 000	18 987 000	19 723 000	21 414 000	1%	9%
Portugal[1,3]	Tourists	17 282 626	19 326 536	20 486 340	20 776 360	20%	1%
Slovak Republic[1]	Tourists	2 475 094	2 084 239	2 165 345	2 421 263	-2%	12%
Slovenia[1]	Tourists	4 701 878	4 658 295	5 053 536	5 471 147	16%	8%
Spain	Tourists	83 509 153	85 169 050	93 759 297	96 803 893	16%	3%
Sweden[1]	Tourists	7 615 781	7 531 006	8 684 886	8 443 196	11%	-3%
Switzerland[1,3]	Tourists	11 817 617	11 620 425	12 312 662	11 702 142	-1%	-5%
Türkiye	Tourists	51 191 882	55 158 614	60 575 773	62 034 424	21%	2%
United Kingdom	Tourists	39 418 000	37 214 000	38 229 000			
United States	Tourists	79 441 595	66 349 859	72 296 865	68 287 793	-14%	-6%
Argentina	Tourists	7 399 049	7 285 688	6 603 877	5 680 796	-23%	-14%
Brazil	Tourists	6 353 141	5 908 341	6 773 619	9 287 196	46%	37%
Bulgaria	Tourists	4 067 350	3 621 413	3 770 036	4 140 353	2%	10%
Croatia	Tourists	17 353 488	16 854 869	17 378 721	17 614 016	2%	1%
Egypt	Tourists	12 875 682	14 726 726	15 723 790	18 902 101	47%	20%
Indonesia	Visitors	16 106 954	11 677 825	13 886 678	15 400 000	-4%	11%
Malta	Tourists	2 753 239	2 981 476	3 563 618	4 022 310	46%	13%
Montenegro	Tourists	2 509 625	2 447 103	2 446 563			
Morocco	Tourists	12 932 734	14 524 727	17 411 949	19 792 604	53%	14%
Peru	Tourists	4 371 787	2 524 658	3 256 693	3 416 464	-22%	5%
Romania[4]	Tourists	2 683 748	2 120 068	2 412 810	2 587 240	-4%	7%

	Type of indicator	2019	2023	2024	2025	Change 2019-2025	Change 2024-2025
Saudi Arabia	Tourists	17 525 636	27 423 536	29 727 443	29 254 787	67%	-2%
Serbia	Tourists	1 846 551	2 134 305	2 384 735	2 348 495	27%	-2%
South Africa	Tourists	10 228 000	8 483 000	8 919 000	10 500 000	3%	18%
Thailand	Tourists	39 916 251	28 150 016	35 545 714	33 000 000	-17%	-7%
EU27[3]		501 237 792	485 746 251	511 487 045	529 557 883	6%	4%
OECD[3]		807 514 297	758 229 565	819 525 945	847 044 600	5%	3%
World[5]		1 469 000 000	1 327 000 000	1 462 000 000	1 534 000 000	4%	5%

Note: For more information, please see country profiles.
Tourists: International tourist arrivals (excluding same-day visitors).
Visitors: International visitor arrivals (including same-day visitors).
1. Data from supply side surveys.
2. Atout France estimate.
3. 2025 data is an OECD estimate.
4. 2025 data is from Eurostat Monthly Arrivals (Database)
5. UN Tourism Data (World Tourism Barometer, Statistical Annex, May 2026)
Source: OECD Tourism Statistics (Database).

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Growth continued into the first quarter of 2026, before being disrupted by the evolving conflict in the Middle East. Across the European Union, overnight stays in tourist accommodation were up 3.4% on 2025 levels in the January-March period (Eurostat, 2026[6]). Globally, travel demand remained similarly resilient at the start of the year, with international arrivals up 2.5% year-on-year in January and February. However, the escalation of the Middle East conflicted has impacted performance since March. As a result, UN Tourism expects international arrivals growth to fall 1 to 2 percentage points below its initial forecast of 3-4% for 2026, depending on the conflict's duration and scope (UN Tourism, 2026[3]).

While international arrivals in half of OECD countries had recovered or surpassed pre-pandemic levels by the end of 2025, arrivals to others are still lagging. Four countries recorded double-digit growth in 2025 to reach record levels of inbound arrivals, led by Finland (up 16.5%), Japan (15.8%), Korea (15.7%) and Norway (12.5%). This has been aided by expanded connectivity and outbound travel from the People's Republic of China in the case of Korea and Japan, building on a strong recovery in 2024 (48.4% and 47.1% respectively). Meanwhile, international tourist arrivals fell in four countries in 2025 and have yet to recover to pre-pandemic levels: Canada (down 0.6%), Germany (0.8%), Ireland (2.8%) and the United States (5.5%). Inbound tourism in Israel has also been significantly impacted by the evolving conflict in the Middle East, and arrivals remain significantly down on pre-pandemic levels (70.8%).

Geopolitical tensions are increasingly shaping tourism dynamics, influencing tourist flows and weighing on the broader tourism economy. Russia's war of aggression against Ukraine has disrupted regional travel patterns, constraining air connectivity and dampening traveller confidence in parts of Europe and neighbouring regions – for example inbound tourism to Estonia remained 16.0% down on pre-pandemic levels in 2025. Similarly, the evolving conflict in the Middle East has contributed to heightened uncertainty, contributing to rising energy prices and affecting travel demand, insurance costs and route planning. These dynamics can lead to shifts in visitor flows, with some destinations experiencing declines while others benefit from shifting travel demand. More broadly, geopolitical instability highlights the sector's vulnerability to external shocks and reinforces need for resilience, risk management, and market diversification strategies.

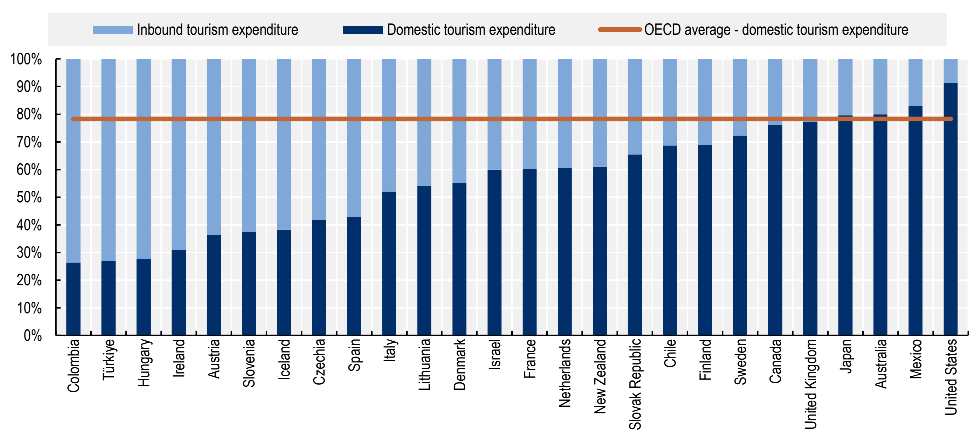
While international demand has shifted in certain countries, the most popular international destinations remain unchanged. According to UN Tourism, France was the most visited country in the world in 2024, counting 102.0 million tourists, followed by Spain with 93.8 million and the United States with 72.4 million.

Türkiye welcomed 60.6 million tourists followed by Italy with 57.7 million. Together, the top five inbound markets accounted for just over a quarter (26.4%) of global international tourist arrivals in 2024 (UN Tourism, 2026[3]). A breakdown of international tourist arrivals to OECD member countries and selected partner economies is provided in Table 1.2.

The importance of domestic tourism varies across countries but remains a stable source of economic benefits, particularly during periods of uncertainty. As the pandemic showed, domestic tourism can help sustain businesses, support employment, and maintain activity across tourism-related sectors. Drawing on this experience, some countries impacted by the conflict in the Middle East have looked to stimulate domestic demand. Domestic tourism is the mainstay of the sector in most OECD countries, with residents responsible for 78.3% of tourism expenditure on average in OECD countries in 2024 or latest year available (Figure 1.5). However, the share is significantly lower in countries like Türkiye (27%) and Hungary (28%), leaving the tourism sector more exposed to drops in inbound visitors. Figure 1.5 provides a breakdown of internal tourism consumption (domestic and inbound) for selected OECD member countries.

Figure 1.5. Domestic and inbound tourism expenditure in OECD countries

As a percentage of internal tourism expenditure, latest available year, 2023 or 2024



Note: Only countries with 2023 and 2024 data shown.
Data for Ireland contains no estimates of non-monetary consumption and does not place a value on vacation accommodation on own account.
Source: OECD Tourism Statistics (Database).

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Uncertain outlook shaped by developments in the Middle East

Looking ahead, short-term challenges are impacting tourism, although demand is expected to remain strong over the longer run. The outlook remains uncertain as tourism navigates a complex and dynamic risk environment, influenced by evolving geopolitical developments, including in the Middle East, as well as broader pressures on the sector. Over the longer term, while there is growing policy momentum to manage tourism more sustainably, a key challenge will be to keep pace with fast-evolving technological development. Advances in digital tools and Artificial Intelligence are already reshaping tourism systems, business models and visitor behaviour, requiring continued adaptation across the sector.

A recent survey of OECD and partner countries indicates broadly positive performance and sentiment. Around half of responding countries report tourism performance moderately above 2025 levels, and more than three quarters expect tourism performance to exceed 2025 levels by the end of 2026. This performance is in line with expectations at the start of 2026 for around half of countries. While high costs and geopolitical factors are key constraints, some destinations report benefitting from shifts towards closer, more accessible and perceived safer locations. Demand remains broadly resilient, though economic and geopolitical factors are influencing traveller behaviour, particularly on where and when to travel. Destination reputation, particularly in terms of safety, continues to play an important role in sustaining consumer confidence. Looking ahead, the main risks for 2026 are geopolitical instability (80% of respondents), persistent price pressures (75%), connectivity disruptions (45%) and economic slowdown in source markets (40%). Meanwhile, sentiment for 2027 remains positive overall.

The evolving Middle East conflict has put the global economy under pressure, with knock-on consequences for tourism, which typically tracks broader economic conditions. OECD projections from early June 2026 indicate that the economic consequences are likely to be felt for some time, even after its resolution (OECD, 2026[1]). Assuming energy prices ease from mid-2026 onward, OECD forecasts that global economic growth will slow to 2.8% in 2026 (down from 3.4% in 2025), before recovering to 3.1% in 2027. Annual consumer price inflation in the G20 countries is expected to rise to 4.0% in 2026 from 3.4% in 2025, before easing to 3.1% in 2027 as energy and food price pressures gradually fade. However, prolonged disruptions could lead to increasing economic and social costs over time.

While the overall impact on tourism has been uneven and relatively contained outside of the countries directly affected, the conflict has disrupted travel flows. Although air services through key regional hubs have partially resumed, airlines have adjusted routes and schedules. Travel to and from the Middle East and destinations that rely on the aviation transit hubs in the Gulf have been most affected. At the same time, higher energy costs are raising transport and other operating costs, while considerations around safety, affordability and potential cancellations may weigh on traveller confidence.

In those countries directly affected by the conflict, the impacts have been more pronounced, with Gulf countries recording sharp declines in international visitor arrivals. These countries have also seen wider impacts from damage to tourism infrastructure and disruptions to local supply chains. While travel advisories remain necessary to ensure traveller safety, they can also have wider unintended consequences by dampening demand in neighbouring destinations and delaying recovery, particularly if not updated in a timely manner as conditions evolve.

Elsewhere, evidence suggests travellers have changed routes and destinations rather than cancelling trips outright. Businesses report operational changes alongside shifts in booking behaviours including shorter booking windows and greater demand for flexibility, while also highlighting the need for co-ordinated responses and public reassurance, including on fuel supply. In response, some destinations are diversifying away from 'higher-risk' travel corridors and strengthening engagement with alternative source markets, particularly domestic and neighbouring countries. At the same time, concerns around overreliance on specific aviation hubs and carriers are bringing greater attention to the need for more diversified and resilient air connectivity.

The recent signing of the Islamabad Memorandum is expected to help restore confidence; however, the situation remains fragile. Evolving travel patterns and risk considerations are already leading to shifts in visitor flows, with some destinations experiencing declines while others benefit. These dynamics are also shaping forward planning, as airlines, tour operators and other tourism providers design their programmes for 2027 and beyond. Any renewed instability could lead to more sustained and widespread impacts, including travel demand potentially softening into 2027 amid cost pressures, connectivity constraints, safety considerations and heightened uncertainty. While tourism demand has so far shown resilience despite recent inflationary pressures, which have seen prices for restaurants and hotels rise by 46.1% compared with 34.9% across the economy between 2020 and 2024 (OECD, 2026[7]), further price pressures could begin to weigh more notably on tourism spending over time.

In this context, travel patterns may continue to be shaped by evolving perceptions of safety, possible disruption, and affordability, at least in the near term. These dynamics present challenges for businesses and destinations, while also, in some cases, creating potential opportunities as demand adjusts. This could contribute to a shift toward more affordable destinations, shorter stays and lower-cost travel options, with implications for overall expenditure levels and the distribution and quality of tourism-related value added. Changes in spending patterns could place pressure on margins, shift demand between higher- and lower-value segments and influence the capacity of destinations and businesses to generate and retain economic value. More broadly, these dynamics underscore tourism's sensitivity to external shocks and interconnected risks, even as the sector continues to demonstrate resilience, supported by accumulated experience and strengthened risk management practices to adapt, recover and thrive.

Digitalisation meanwhile is a cross-cutting transformation reshaping the tourism system, from business models and service delivery to visitor management and destination planning. The increasingly use of digital tools and data-driven approaches, including Artificial Intelligence, is enabling more personalised services, optimising operations, and supporting real-time management of visitor flows. It is also enhancing the evidence base for decision making, through improved data collection, integration and forecasting capabilities. These shifts are lowering barriers to entry for entrepreneurs, stimulating new business models and driving greater connectivity across the tourism value chain. At the same time, the pace of change highlights the need for forward-looking policies to support adoption, strengthen digital skills, and ensure that digital transformation contributes to sustainable tourism development.

Recent OECD work for the G7 and APEC highlights the significant opportunities that AI developments offer to boost innovation and strengthen resilience across the sector (OECD, 2024[8]) (OECD, forthcoming, 2026[9]). At the same time, these developments raise important policy challenges related to skills, data governance, and the responsible use of technology, underscoring the need for coherent policy frameworks and supports for SMEs to ensure digital transformation promotes sustainable tourism development. (OECD, 2024[8]). A recent OECD survey has highlighted that while SME adoption of AI tools is increasing rapidly, with sustained uptake of off-the-shelf AI applications, strategic, targeted and secure integration within business operations remains uneven (OECD, 2026[10]) Governments have a key role to play in creating enabling conditions that help tourism businesses of all sizes harness the benefits of AI, other new technologies and the digital transformation while managing emerging risks.

Environmental pressures including water scarcity, land-use constraints and heightened exposure to natural hazards are prompting countries to reassess traditional tourism development models. At the same time, the increasing frequency and intensity of extreme weather events are adding further complexity, reinforcing the need for more resilient and adaptive tourism systems. Extreme heat, wildfires, floods and severe storms are already affecting destinations, damaging infrastructure and influencing travel behaviour. As highlighted in Chapter 4, the sector's reliance on natural assets and safe, predictable conditions means that proactive policies and targeted investments will be needed to prepare the sector for the growing scale of extreme weather impacts. Strengthening preparedness and adaptative capacity will be essential to safeguard tourism assets, sustain visitor confidence, and support the long-term resilience and sustainability of the sector.

Other structural trends reshaping tourism include rapid income growth and expansion of the middle class in emerging economies, which are increasingly important drivers of demand. By 2030, the global middle class is projected to reach around 5 billion people, up from about 4 billion in the early 2020s (Kharas, 2026[11]). This expanding consumer base is expected to significantly boost tourism demand (World Economic Forum, 2025[12]), building on major source markets such as China and the fast-growing Indian market. Realising this opportunity will require adapting tourism offers to evolving preferences while managing associated social and environmental impacts.

In addition to emerging markets, evolving travel preferences among younger generations are expected to further shape tourism demand and drive diversification of products. By 2030, Millennials and Generation Z are projected to account for more than half of global travellers, with spending patterns increasingly oriented towards experiences rather than goods (World Economic Forum, 2025[12]). This shift is creating opportunities in experience-based segments such as cultural and music events, and sports tourism, with the latter estimated to have generated USD 609 billion globally in 2023 and expected to grow by 16% annually from 2024 to 2030 (UN Tourism, 2024[13]). While these trends offer significant potential to enhance value creation and extend tourism benefits, they also reinforce the need for destinations to adapt offerings and manage impacts to ensure long-term sustainability.

The growth in demand risks putting pressure on destinations, including on infrastructure, natural resources and local communities, and may exacerbate spatial and seasonal imbalances. However, there is increasing recognition of these challenges and progress is being made to manage tourism more sustainably. As Chapter 3 highlights, efforts to enhance the social benefits of tourism are gaining momentum, with a stronger focus on balanced tourism development and better community outcomes. Sustaining this progress will be key to aligning tourism development with broader sustainability objectives and supporting long-term value creation.

Co-ordinated policy action across all levels of government is needed to navigate these complex trends in an increasingly uncertain environment. More integrated, flexible and anticipatory approaches are required to address structural weaknesses in tourism development models and tackle imbalances in the distribution of tourism activity and benefits. This includes enabling the sector to harness opportunities from digitalisation and Artificial Intelligence, accelerating action to mitigate and adapt to environmental change, and ensuring that the economic and wider benefits of tourism are more evenly shared across local businesses, workers and communities. These issues are further discussed in Chapter 2.

Toward more balanced, sustainable and resilient tourism outcomes

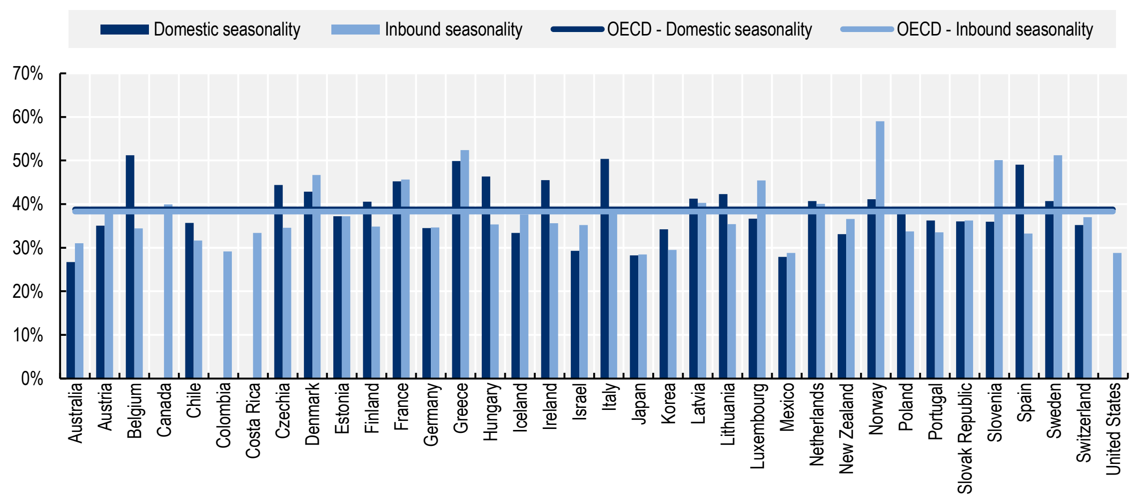
The economic outcomes of tourism also have important social and environmental implications, encompassing both benefits and costs. While tourism can support community well-being, cultural exchange, and the conservation of natural and cultural heritage, growth in tourism can also create tensions between visitors and local communities, particularly where value added is not well captured locally or where demand is highly concentrated geographically or seasonally. In addition, tourism is resource-intensive and a contributor to emissions and waste, with potential impacts on ecosystems and environmental quality. Building on ongoing OECD work to develop a core set of indicators to better measure tourism's wider impacts beyond the economy and support more balanced and evidence-based policymaking across countries, this section presents evidence on several key indicators.

Seasonality is a common structural feature of tourism and key issue for many national and destination-level tourism strategies and programmes. High concentration of tourism demand in specific periods of the year can strain infrastructure and communities during peak periods, while leading to underused capacity and less stable economic benefits in off-peak periods. In addition to being a sustainability issue, seasonality has implications for resilience because it concentrates risks and pressures unevenly over time and a strong reliance on short peak periods makes tourism economies more vulnerable to shocks.

Across OECD countries, around 40% of tourist nights are concentrated in the top three months with similar trends for domestic and inbound tourism. However, the data reveal significant cross-country differences. In Norway (59%), Greece (52%), Sweden (51%) and Slovenia (50%), more than half of inbound tourist nights are concentrated in just three months, which may reflect tourism models strongly linked with climate and nature-based tourism patterns (Figure 1.6). Less seasonal destinations such as Japan (28%), Mexico (29%), United States (29%), Colombia (29%) and Korea (30%) show more evenly distributed demand, with less than 30% of nights in peak months. This suggests a more diversified and less weather-dependent tourism offer, supported by year-round products such as business travel, urban tourism and cultural activities, and indicates that these countries benefit from more stable economic activity and employment throughout the year. However, in the absence of more granular sub-national data this data may mask important destination-level variations, which may be both temporal and spatial in nature.

Figure 1.6. Seasonality in OECD countries

Tourist nights in top three months as a share of total tourist nights, 2024



Source: OECD Tourism Statistics (Database).

StatLink https://stat.link/hxa3nb

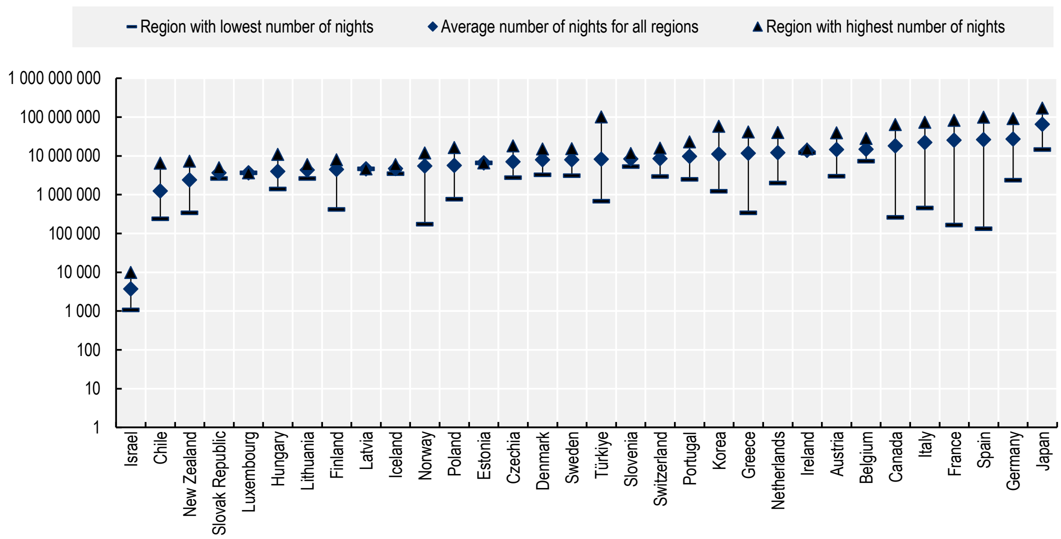
Spatial concentration is also a common structural feature of tourism, which can create significant economic, social, and environmental challenges. The clustering of visitors in a limited number of destinations can strain infrastructure, degrade natural and cultural assets, and reduce residents' quality of life, while less-visited regions miss out on tourism benefits. This imbalance also increases vulnerability, as reliance on a few key destinations makes the tourism sector more exposed to external shocks and limits overall sustainability and resilience.

Across OECD countries, tourism demand is spatially concentrated, with around 47% of tourist nights concentrated in 10% of regions with data available (Figure 1.7). In many countries, a small number of regions account for a large share of total guest nights, typically major cities, coastal areas, or well-established tourist hubs. This reflects strong destination attractiveness but also indicates imbalanced spatial distribution. In contrast, a long tail of regions receives relatively few visitors, pointing to underutilised tourism potential in less prominent areas. This underscores a key policy challenge for countries: managing pressure in high-demand regions while promoting dispersion to less-visited areas, to improve sustainability, reduce overcrowding, and support regional economic development.

The distribution of tourist nights varies widely within countries, highlighting opportunities to spread the sector's benefits more evenly. In 2024, across the OECD, the region with the highest number of tourist nights recorded on average six times more than the least visited region in terms of overnights. These disparities were particularly pronounced in countries like Spain and France. In Spain the most visited region (Canary Islands) had 743 times more nights as the least visited (Melilla), while in France the difference was 501 times (Île-de-France which includes Paris and the remote overseas territory of La Mayotte in the Indian Ocean respectively). In Japan, Southern-Kanto, which is home to Tokyo recorded the highest number of tourist nights among OECD regions, with 170 million, followed by the Kansai region which includes Kyoto and Okinawa, at 121 million. By contrast, Shikoku recorded the lowest number of nights in Japan, with fewer than one-tenth of Southern-Kanto's total, although still reaching a substantial 15 million nights. These patterns demonstrate a strong concentration of tourism in specific destinations, which if not well managed can lead to pressure on those areas. At the same time, they point to opportunities for developing tourism in less-visited regions and for more evenly distributing the economic returns of the sector across countries.

Figure 1.7. Regional spread in tourist nights in OECD countries

Tourist nights at TL2 level (log scale), 2024



Note: Data for Iceland is from 2023.
Source: OECD Regional Statistics - Tourism (Database).

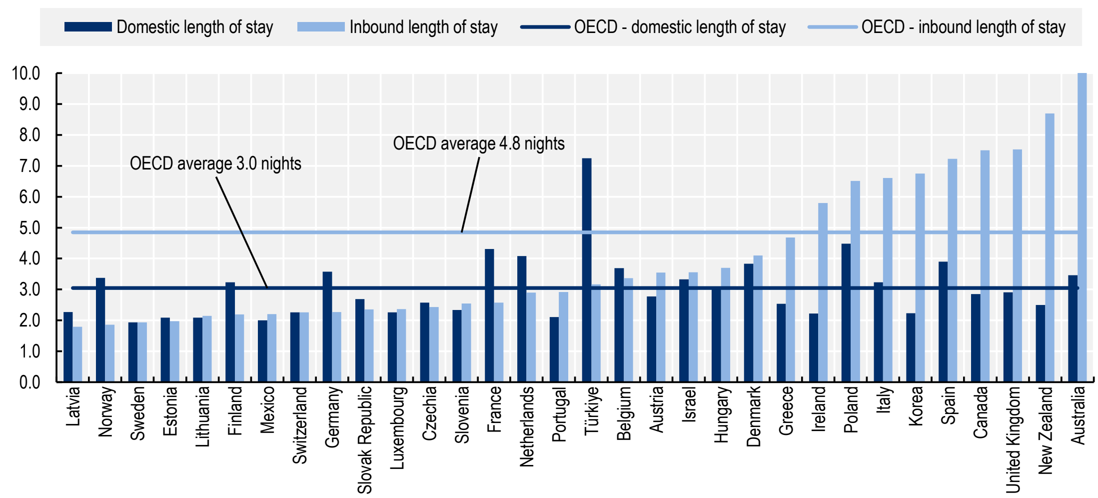
StatLink https://stat.link/gz0rim

Length of stay is also an important tourism metric because it directly influences expenditure patterns, resource use, and the distribution of tourism activity. Data show clear differences between domestic and inbound tourism, as well as notable variation across OECD countries. In most countries, inbound visitors stay longer than domestic tourists, reflecting higher travel costs and longer distances. The case of Australia (35.7 days, nearly five times more than the next highest country) highlights this pattern at the extreme, given its distance from many source markets encourages longer stays, while also being a popular destination for international students and its working holiday visa programme. Domestic tourism, while characterised by shorter stays, provides more frequent and stable demand, with less variation across countries falling between 2-4 nights with the notable exception of Türkiye (7.2 nights), Poland (4.5) and France (4.3). Across OECD countries, the average length of stay for international tourists was 4.8 nights in 2024, compared to 3.0 nights for domestic travellers, the inbound length of stay falls to 3.9 nights when Australia is excluded while the domestic length of stay remains unchanged (Figure 1.8).

These length of stay differences have important implications for the economic value, sustainability, and resilience of tourism. One possible implication is that inbound tourism may generate higher value per trip, even if volumes are lower, while domestic tourism may contribute to stable, year-round demand, even with lower spend per trip. Data on visitor spend would be needed to validate this.

Figure 1.8. Length of stay in OECD countries

Average number of nights per trip, 2024



Note: For readability the y-axis of the chart has been limited to 10. Inbound length of stay for Australia is 35.7. Data for domestic length of stay for Israel is from 2023.

Only countries with arrivals and nights data from the same source.

Data for domestic length of stay for Austria, Czechia, Greece, Italy, Lithuania, Luxembourg, Portugal, Slovak Republic, Sweden and Switzerland is from supply side surveys.

Data for inbound length of stay for Austria, Belgium, Czechia, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Israel, Latvia, Lithuania, Luxembourg, Netherlands, Norway, Portugal, Slovak Republic, Slovenia, Sweden, Switzerland and Türkiye.

Data for Australia and United States include short-term international students (less than 1 year).

Source: OECD Tourism Statistics (Database).

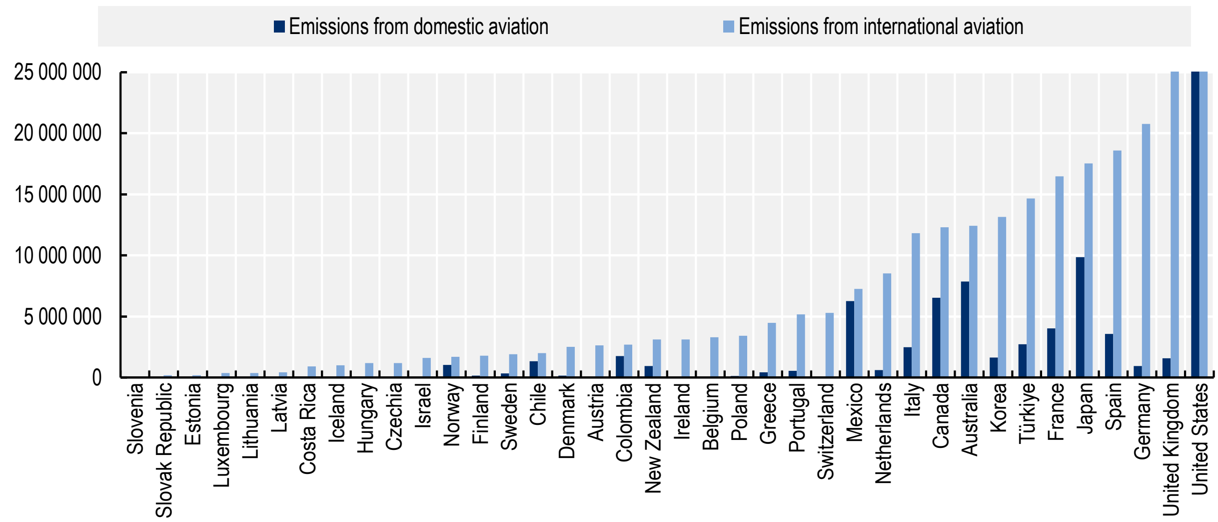
StatLink https://stat.link/favbsg

Tourism is closely linked to the natural environment, which underpins destination attractiveness while the sector itself is also resource-intensive. At the same time, tourism is a significant driver of transport emissions, particularly from passenger aviation. These emissions are unevenly distributed and closely linked to income levels, geography and travel patterns, with higher emissions associated with long-haul and high-intensity travel markets. As tourism demand continues to grow, especially internationally, these pressures are likely to increase, reinforcing the need to accelerate the transition to more sustainable aviation and integrate climate considerations into tourism development pathways.

Experimental data reveals novel insights into the significant contribution of passenger aviation to emissions across OECD countries. This data records the carbon dioxide emissions related to the combustion of jet fuel and aviation gasoline sold in a given country by estimating the emissions generated by all flights taking off from that country (Clarke et al., 2022[14]). This varies widely across countries and destinations, for example domestic passenger aviation in Australia emits 7.9 million tonnes, while the equivalent figure in Slovenia is 21 tonnes (Figure 1.9). These disparities underline that emissions are highly dependent on country-specific factors. Australia’s large geographic size and well-developed air transport infrastructure results in a high volume of domestic flights, whereas Slovenia’s smaller size and population limit demand for domestic flights. Despite these considerations, such data is useful to provide a snapshot of current emissions to benchmark across OECD countries.

Figure 1.9. Carbon emissions from passenger aviation in OECD countries

Tonnes of carbon dioxide, 2024



Note: For readability the x-axis is limited to 25 million. Emissions from international aviation is 31.7 million tonnes for the United Kingdom and 68 million tonnes for the United States. Emissions from domestic aviation is 132 million tonnes for the United States.
Territory-based emissions for a given country correspond to the emissions generated by all flights taking off from this country during the reference period (Clarke et al., 2022[14]).
Source: OECD Air transport emissions (experimental) (Database).

StatLink https://stat.link/yjfbgu

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Note

[1] Including forestry and fishing

Chapter 2. Tourism policies, priorities and governance

Governments are increasingly rethinking how tourism is managed and adopting more strategic approaches that seek to balance economic, social and environmental outcomes while strengthening competitiveness and resilience. This is accompanied by evolving governance arrangements, greater use of data and digital tools, and closer co-ordination across policy domains and levels of government. This chapter examines developments in tourism policy priorities, reforms and governance, drawing on a survey of OECD and partner countries and highlighting examples of country practices.

Tourism is a major driver of economic growth and plays a key role in stimulating economic activity, creating jobs, promoting regional development and supporting local communities. As demand continues to rise, its impacts on communities and the environment are becoming more pronounced, intensifying the need for more strategic tourism policy. Countries are increasingly shifting from growth-led approaches towards managing tourism in ways that deliver long-term, resilient economic prosperity. This shift reflects growing recognition that traditional models have produced uneven outcomes.

Tourism success is now being redefined with stronger emphasis on the social and environmental impacts, crisis preparedness and adaptive capacity. Many countries are renewing national tourism strategies to embed these priorities, even as performance diverges across destinations and pressures from rapid or unplanned growth re-emerge alongside heightened geopolitical and economic uncertainty.

Governance is also evolving. While national frameworks remain stable, local and regional actors are playing a larger role in destination management, highlighting the need for close vertical co-ordination and community engagement. Better data and digital tools underpin these changes. There is growing evidence that countries are investing in more granular, integrated data and are increasingly exploring the use of Artificial Intelligence (AI) to support evidence-based decision making. However, adoption levels remain uneven, and many initiatives are still emerging.

This chapter examines how tourism policies and priorities are evolving as governments seek to address long-standing challenges while strengthening the sector's capacity to navigate uncertainty and positioning the sector for a more competitive, sustainable, and resilient future.

Strengthening governance for improved tourism management

The tourism sector is in the process of great change, emerging strongly from consecutive crises including health events, geopolitical tensions, and natural disasters. The sector is also navigating shifting policy priorities as countries move away from recovery strategies and volume-based growth targets, towards more responsive, digital and balanced tourism models that enrich local communities and protect the environment, while growing the economy overall. Linked with this, strategies increasingly seek to integrate tourism policy with broader economic, local and regional development plans and policy agendas.

Rethinking tourism governance is increasingly necessary as policymaking becomes more complex, interconnected and dynamic. The accelerating pace of change requires governance models that are more agile, integrated and capable of addressing cross-cutting challenges. Action at the destination level has a particularly important role to play in driving momentum for change, supported by an overarching national vision that is responsive to local needs and priorities, and anchored in broad stakeholder engagement. To deliver on these ambitions, more co-ordinated, adaptive governance models and management structures are needed, coupled with adequate institutional capacity at all levels of government to plan, implement and monitor effective tourism policy and destination management.

Designing strategies to support shifting priorities and maximise tourism value

Tourism strategies are evolving to reflect changing dynamics and local perceptions of tourism, with a greater emphasis on maintaining economic value while addressing the environment and community impacts, including by promoting a more balanced spread of tourism activity across regions and seasons. This is reflected across OECD countries, where many national tourism strategies have been recently updated or are currently being developed or revised, including in Austria, Chile, France, Germany, Japan, Poland, Portugal, Spain and the United Kingdom.

Launched in 2025, Spain's Strategy for Tourism 2030 redefines tourism success as that which benefits residents, workers and visitors alike, preserves identity, ensures well-being and promotes sustainability.

The Strategy is based on the foundational principles that people are at the centre of tourism, and that economic, social and environmental sustainability are interdependent. Similarly, Portugal's Tourism Strategy 2035 will seek to align tourism growth with territorial cohesion, community well-being, and environmental responsibility, while calling for a more agile, innovative, and regenerative model of sectoral governance and value creation.

Box 2.1. Driving tourism action with targeted tourism strategies and action plans

Austria: The national tourism strategy "Vision T" outlines tourism policy through 2035 and focuses on five key areas: economic strength and resilience, labour market and skilled workers, innovation and digitalisation, resources and responsibility, as well as added value and participation. It is complemented by action plans that define concrete measures and actions.

Chile: The National Strategy for Sustainable Tourism 2035 is complemented by several targeted strategies, including the Disaster Risk Management Plan for the Tourism Sub-sector, the Climate Change Adaptation Plan for the Tourism Sector in Chile, and programmes to support social tourism.

Estonia: The Long-Term Outlook for Estonian Tourism 2025-2035 is supported by the Sustainable Tourism Action Plan to guide the transition toward a more sustainable tourism model. It aims to ensure long-term environmental, social, and economic sustainability in tourism by implementing targeted policy recommendations through co-ordinated actions by the Ministry of Economic Affairs and Communications and Visit Estonia.

Hungary: The National Tourism Strategy 2030 is complemented by the Active Tourism Development Strategy 2030, which aims to increase the participation rate and frequency of active tourism and recreational activities among Hungary's population. It provides a framework for co-ordinating a wide range of state and local government initiatives, as well as private investments, to mobilise active tourism development and to support a healthier and more environmentally conscious mindset in Hungary.

Ireland: A New Era for Irish Tourism: The National Tourism Policy Statement is supported by several strategies, including Business Events 2030, which aims to promote Ireland as a premier global destination for meetings, incentives and conferences travel. It focuses on attracting high-value business events, fostering sustainable development, creating long-term careers, and promoting regional tourism.

Indonesia: The National Tourism Strategic Plan 2025-2029 is supported by the Tourism Sector Decarbonisation Roadmap, which supports the transition towards a low-carbon, climate-resilient tourism sector and the Tourism 5.0 Framework, which promotes the use of digital technologies, data analytics, and AI to enhance the entire visitor journey.

Portugal: The Tourism Strategy 2035 will be complemented by the Climate Agenda for Tourism 2025-2030, designed as an action plan focused on decarbonising and building the sector's resilience.

Switzerland: The Tourism Strategy of the Swiss Confederation is supported by the Swiss Federal Council's Strategy for Adaptation to Climate Change, which aims to prepare the country for climate change impacts by minimising risks and strengthening resilience across society, the economy, and the environment.

Thailand: The third National Tourism Development Plan 2023-2027 is complemented by the Tourism Master Plan under the 20-Year National Strategy, which aims to use the tourism sector as a strategic tool to reduce inequality in Thai society. It focuses on high-value tourism, while at the same time integrating other high-potential service sectors to avoid over-reliance on a single tourism dimension.

Japan's Tourism Nation Promotion Basic Plan launched earlier this year is structured around three key pillars: balancing inbound tourism with the needs of local residents, promoting domestic and outbound tourism, and building resilient tourism destinations and a resilient tourism sector. The Plan sets out key directions to develop sustainable tourism, increase consumer spending, promote tourism in regional areas, strengthen transportation networks and urban development through tourism, and leverage new technologies.

At European level, the European Union's first Sustainable Tourism Strategy, which will be launched in 2026, aims to support a competitive, sustainable, and community-based tourism model. The Strategy will shift the focus away from tourism volume to value, prioritising support for tourism destinations to balance tourism flows, empower tourism small and medium-sized enterprises (SMEs) and build the skills of the sector, and create better data and indicators for evidence-based policymaking.

While national tourism strategies continue to provide overarching frameworks for the sector, countries are increasingly complementing them with sub-strategies and action plans to better target policy outcomes and engage stakeholders. Multi-phase action plans in particular help to translate high-level policy priorities into more practical, targeted and action-oriented measures, often tailored to specific authorities. The development of these plans typically involves participatory processes and broad consultation to reflect the needs of various stakeholders. Although such processes can extend development timelines, they tend to foster stronger public-private co-operation and result in more cohesive and co-ordinated implementation. In parallel, dedicated sub-strategies in areas such as adaptation, digitalisation and accessibility further support targeted policy delivery, particularly where co-ordination across multiple levels of government, agencies, and the private sector is required (Box 2.1).

Co-ordinating action across all levels for tourism policy design and implementation

Horizontal co-ordination across policy domains remains important for tourism development, reflecting the sector's strong interdependencies with domains such as transport, housing, labour markets, environmental management, digitalisation and regional development. For example, a strategic priority of Canada's Federal Tourism Growth Strategy is to improve co-ordination to support a whole-of-government approach to tourism. A Ministerial Tourism Council engages ministers whose mandates and departments include essential policy and programme instruments that impact tourism, such as employment and skills, transportation, border services, and housing.

Effective tourism policy implementation also requires input and participation of wider stakeholders, including the private sector. Many countries continue to develop effective mechanisms and approaches to maintain an active and consistent voice for the private sector in government fora as well as ensuring the private sector is engaged and plays its part implementing actions and plans to deliver on a common vision for tourism. However, this can be challenging due to the fragmented nature of the sector. Tourism industry associations can provide opportunities for the private sector to combine resources to tackle issues through industry-led initiatives, as well as to amplify common concerns or challenges to national tourism authorities (OECD, 2024[1]).

Many countries are actively leveraging established co-ordination mechanisms to engage across government and with the private sector to monitor and respond to the tourism impact of the conflict in the Middle East, building on the lessons from response to the COVID-19 pandemic and other shocks on the importance of co-ordinated communication, risk assessment and data sharing. For example, Greece and Türkiye are working closely with airlines and tour operators to track demand shifts, adapt market diversification strategies and provide (near) real time travel guidance.

At the same time, countries are strengthening consultation approaches to shape longer-term policy, using various mechanisms to involve the private sector and other stakeholders in the design and delivery of national tourism strategies. In the United States, the private sector is closely engaged in developing the new national tourism strategy. More broadly, tourism councils, taskforces and similar bodies are being used to sustain structured dialogue and align action among stakeholders. For instance, Lithuania's Tourism Council which includes tourism-related ministries and industry associations advises the Ministry of Economy, while in Chile the Undersecretariat for Tourism convenes a range of public-private actors including municipalities, industry associations, academia, communities and civil society to develop and implement tourism plans and programmes. These approaches help ensure that policy responses are timely, evidence-based and grounded in sector realities.

National governments are placing greater emphasis on strengthen local and regional destination management, which requires more effective multi-level governance and closer alignment across tourism authorities. While policy development and co-ordination often remain centralised, tourism activities are is inherently place-based and dispersed across different destinations, necessitating tailored strategies that reflect the specific characteristics and development priorities of individual destinations. Destination planning has evolved beyond the traditional marketing focus towards a broader emphasis on development and management, often embedded into broader regional economic development strategies. Establishing formal mechanisms to link national and sub-national actions, such as shared frameworks, guidelines and co-ordination platforms, can help ensure coherence and strengthen overall efforts. For example, an OECD review of Italy's tourism governance highlighted the need for clearer national guidelines to support regions and destination management organisations (DMOs), promoting greater alignment, quality standards and strategic harmonisation across destinations (OECD, 2025[2]).

Establishing permanent forums or holding regular co-ordination meetings between national and regional authorities can further support the development and implementation of such guidance. In Hungary, work is underway to establish a new network of destination management services to enhance communication between local and central levels and within destinations, fostering a more destination-based approach to product development and market entry. Similarly, Bulgaria is strengthening co-ordination with regional administrations to improve the implementation of regional tourism development strategies.

Some countries are taking a more decentralised approach to tourism governance. While national governments are setting the long-term strategic goals for the sector, destinations are playing a greater role to achieve them. In Chile, decentralisation is a priority under the National Strategy for Sustainable Tourism 2035. Work is underway to decentralise the National Tourism Service, transferring some powers that are relevant at the territorial level. The objective is to improve the application of these powers by having them implemented by the respective regional government.

Even without formal decentralisation strategies, many countries are looking to co-ordinate local tourism development and management across all destinations, ensuring consistency and linking national and sub-national actions. In some countries, this has resulted in more formalised DMO systems, with defined spatial boundaries, roles and responsibilities. For example, Greece is incentivising the use of an established governance framework in Destination Management and Marketing Organisations to drive optimal destination management, supported by the Ministry of Tourism. In the United Kingdom, nationally supported Local Visitor Economy Partnerships (LVEPs) were created in 2022, with the aim to transform the destination management landscape, attracting investment, and supporting and growing local visitor economies. By the end of 2025, 37 LVEPS were accredited across England, covering a broad mix of urban, rural and coastal destinations, with further LVEPs in development. LVEP performance is monitored locally through delivery plans and nationally through evaluation by VisitEngland.

Some national governments are working with destinations to implement tailored destination plans country wide. In Ireland, Destination Experience Development Plans are developed collaboratively with stakeholders, including local authorities. These five-year strategies aim to grow tourism in a specific area by enhancing visitor experiences and maximising the potential of tourism development projects. In Croatia, the Tourism Act, which entered into force in 2024, mandates the preparation of four-year Destination Management Plans at local and regional levels which align with national priorities. It also requires the establishment of standardised sustainability indicators addressing economic, environmental, and social impacts. The Act empowers local authorities to define their destination identity and manage tourism growth based on local carrying capacities. Croatia also provides detailed guidelines, templates, and support services to ensure consistent implementation.

Czechia has revised its tourism governance system under the Action Plan 2024-2025, including the revision and update of the national categorisation of DMOs, strengthening multi-source financing, providing methodological support for destination management, and improving horizontal and vertical co-ordination. The local and regional tourism management systems and tourism infrastructure are supported through subsidies, co-financed by regional governments. Czechia is creating tourism development strategies for all 14 regions, which align with national objectives while addressing specific regional contexts. Further development of categorisation and certification of DMOs is expected to continue in the current Action Plan 2026-2027.

Building the capacity and resources to support strong tourism governance

As the roles and responsibilities associated with tourism management continue to evolve and expand, there is a growing need for enhanced skills, institutional capacity, and financial resources across all levels of governance. However, human and financial capacity constraints remain a challenge, within national tourism administrations and at destination level. In this context, national governments have an important role to play in strengthening system-wide capabilities, supporting destinations to develop these new competences, and ensuring that adequate resources and expertise are in place to deliver increasingly complex tourism policies (OECD, 2025[3]).

Targeted training and capacity-building programmes can empower stakeholders at all levels, equipping local governments and DMOs with the knowledge and expertise needed to respond to evolving industry trends and manage tourism more effectively. Priority areas include strategic destination planning, balanced tourism development, digital capabilities and crisis preparedness. In parallel, investments in analytical tools and data systems can further enhance these efforts. For example, Colombia's Territorial Tourism Development Level Platform is a methodological tool that determines a destination's current tourism development level and identifies gaps, progress, institutional capacities, territorial conditions, and critical factors influencing performance. This tool enables comparative analysis among municipalities, tourism progress tracking, and the prioritisation of strategic actions, thereby strengthening planning, inter-institutional co-ordination, and evidence-based decision making. Scaling such approaches can help governments build more resilient, responsive, and data-driven tourism systems.

Countries are also strengthening strategic planning and co-ordination mechanisms at national level to ensure that available resources are aligned around shared priorities. Whole-of-government strategies and co-ordination play a role in improving coherence, avoiding duplication and enhancing the impact of limited resources. Finally, financing and investment at national level remain important for the resourcing of tourism governance and management. This is discussed in more detail at the end of the chapter.

Harnessing data for informed tourism decision making

Governments at all levels need robust, timely and relevant data to better understand the impacts of tourism on economies, destinations and local communities, to in turn design targeted and concrete actions, and manage the trade-offs to achieve better outcomes (OECD, 2024[1]). The well-documented shortcomings of existing tourism data include a lack of granularity, timeliness, comparability and availability. Countries are taking steps to make improvements in these areas.

The need for timely, granular data to support a strong evidence-base for tourism policymaking has been emphasised by recent shocks, including the COVID-19 pandemic and more recently the conflict in the

Middle East. This has driven progress and momentum on tourism data issues. Frameworks aligning strategies for tourism data and policymaking at the national level highlight the increased emphasis on data-based decision making. For example, France is developing a Tourism Data Roadmap to support the circulation and valorisation of tourism data in the coming years, both to inform public policy and to help stakeholders develop new use cases.

Countries continue efforts to implement the Tourism Satellite Account (TSA) to accurately measure the direct contribution of tourism to the economy. For example, recent OECD work supported the TSA implementation in Greece (OECD, 2025[4]) and Malta (OECD, 2025[5]). Efforts also focus on improving the underlying data systems by enhancing data collection methods, timeliness, granularity, and accuracy, including through the use of alternative data sources, while strengthening the communication of TSA results. At European level, Eurostat now regularly collects and disseminates TSA data (European Commission, 2026[6]). There is a growing interest in measuring tourism's indirect economic impacts across the supply chain, reflecting demand for inputs from multiple sectors. Countries are also working to link economic and environmental measurement by integrating the TSA with the System of Environmental-Economic Accounting. This requires input-output models to trace tourism's broader economic and environmental impacts.

Increasing decentralisation of decision making has also heightened the need for reliable regional and local tourism datal. This has renewed efforts to develop regional TSAs in some countries. For example, Sweden adopted a big data based methodology to measure the economic impact of tourism at regional and municipal level. Croatia mandated destination-level data collection to prepare the TSA under its Tourism Act. The United States released its first report since 1997 measuring the economic impact of overseas visitors across US states and territories, including their spending and contribution to jobs (U.S. Department of Commerce, 2026[7]).

Digitalisation is opening new data opportunities and challenges for tourism measurement. Opportunities include potential to innovate, collect and share more timely and granular data to support evidence-based decisions, but challenges related to skills, costs, data quality and privacy remain. Alternative and real-time data solutions, such as accommodation trackers or digital booking data, can provide policy-relevant insights without increasing reporting burden on tourism businesses. Using alternative data to strengthen and complement official tourism statistics and improve data sharing for decision making is an area of ongoing work, as highlighted in the OECD Tourism Paper 'Using alternative data sources and tools to measure and monitor tourism' (OECD, 2025[8]).

Many countries are taking steps to incorporate environmental and social objectives into national tourism strategies, including community acceptance (e.g. Austria, Denmark, Estonia, Spain), and the carbon footprint of tourism (e.g. Canada, Chile, Croatia, Ireland, Norway), supported by new data initiatives to track progress. However, further work is needed to standardise these measures to improve consistency and comparability within and between countries.

Internationally, the Statistical Framework for Measuring the Sustainability of Tourism (SF-MST) provides a common foundation for definitions and data structures (UN Tourism, 2024[9]). Building on this, the OECD Tourism Committee has developed a core set of 12 indicators and 23 metrics to support sustainability measurement across key policy areas. This work draws on country-specific work in Greece, Malta, Portugal, Slovenia and Spain as well as existing international measurement frameworks and initiatives. Efforts are now focused on operationalising these indicators and identifying a harmonised core set of internationally comparable indicators in collaboration with the European Commission and UN Tourism. The EU Tourism Dashboard also continues to monitor the tourism transition (European Commission, 2025[10]).

An important challenge remains in how tourism data and statistics are used to inform decision making. For example, while the TSA provides a robust measure of tourism's direct economic contribution, its impact is limited if results are not clearly communicated to policymakers and stakeholders. Strengthening data-sharing mechanisms can help bridge the gap between data producers and users, supporting informed decisions at both national and sub-national levels.

Improving the integration and use of tourism data is increasingly a priority across all levels of government. Tourism data hubs and information systems can help to bridge information and producer-user gaps (OECD/European Union, 2025[11]) and provide a stable foundation to support the use of AI. For example, Poland's Tourism+ data portal integrates data from surveys, official statistics and booking platforms. Linked to the national System of Public Registers on Tourism, the platform has built-in algorithms to forecast changes in the use of accommodation establishments, monitor trends and help to plan tourism policy effectively at different administrative levels. Sweden launched a national collaboration project to establish a standardised Application Programming Interface (API) for the tourism sector. The initiative makes it possible to collect, structure and distribute tourism data in a uniform way, ensuring that businesses, regions, and international platforms can access reliable information at a lower cost and with higher quality, supporting innovation, smarter services and a stronger international reach. Chile has standardised and integrated official data sources to create MapaTurismo, an open-source tourism information system across multiple geographic levels which is accessible to local authorities and the general public (Box 2.2).

Box 2.2. Harnessing official data through tourism information systems in Chile

Through the development and implementation of tourism policies in the post-COVID period, it became clear that official tourism data in Chile was fragmented, highly aggregated and not sufficiently timely. As a result, it was difficult to develop evidence-based policies for the sector. To address these challenges, Chile integrated official data sets into a platform interface accessible to local authorities and the general public. Work was carried out to harmonise geographies and territorial hierarchies (country, region, commune), automate quality controls, comply with data protection regulations, and at the same time, be lightweight and cost-efficient.

MapaTurismo Chile was officially launched in March 2026 and provides a multi-level tourism information platform that consolidates official sources and allows for the visualisation, consultation, and reporting of key tourism indicators, including visitor flows, tourism supply, economic impacts, and territorial level statistics. The platform links dispersed official data from multiple sources through open standards using low-load cloud services and maintains an emphasis on usability. This system relies on automated collection, including web-scraping where APIs are not available, and has automated data validation checks to flag inconsistencies and anomalies before publication. Data is protected by publishing only aggregated and anonymised outputs.

The platform includes graphical, reader, and timeline modes of use, and generates downloadable reports to support planning, management, and monitoring at different levels of government. The platform remains relatively cost-efficient as it is a self-developed solution with a lightweight architecture.

Italy's Tourism Digital Hub is designed to work as a bridge between tourists and operators. It was developed to overcome existing structural deficiencies and establish a single, official national digital ecosystem for tourism. The goal is to provide an institutional tool capable of interacting with all stakeholders and offer a reliable source of information to standardise data, centralise information and boost competitiveness. Currently under development, Malta's AI in Tourism Platform will use AI to analyse diverse tourism-related data to gain insights into tourist behaviour and improve decision making. The platform will offer real-time recommendations to tourists and support government policymaking, and it will include an Open Data Platform to enhance transparency. Montenegro's new Tourist Information System will provide a platform to enable automatic monitoring, better records and data transparency, the automation and acceleration of processes, reduction of administrative burden, and better identification of informal tourism activities. Montenegro has allocated budget for the Tourist Information System's development, testing, implementation, monitoring, evaluation, and maintenance.

Data spaces can be effective tools to share data, when well-structured and managed. The European Commission is developing the European Tourism Data Space to support the tourism sector to exchange data, and improve decision making, operations and the visitor experience by promoting more personalised and efficient tourism services. Ongoing initiatives support the continued evolution of the Data Space, allowing real-time data sharing that benefits SMEs and larger tourism operators alike. Specified collaborative networks were introduced to ensure standardised, secure, data exchange across sectors, and transport and mobility data were integrated to create a unified tourism data ecosystem.

Deploying new technologies to boost tourism innovation

Rapid technological change and digital adoption is fundamentally reshaping tourism. OECD Tourism Committee work for the G7 and APEC highlights the transformative role of AI in particular as a key driver of innovation, operational efficiency and personalised services, while also offering significant potential to help address pressing challenges in the sector (OECD, 2024[12]; OECD, 2026, forthcoming[13]). AI applications are being deployed, with more and more destinations and businesses looking to use these technologies to enhance the visitor experience through more interactive and personalised experiences, streamlined travel processes, strengthened market intelligence and data-driven decision making.

The G7/OECD Policy Paper on Artificial Intelligence and Tourism marked the first sector-specific contribution to global AI policy discussions, highlighting opportunities and challenges for tourism stakeholders (OECD, 2024[12]). Since its endorsement by G7 Tourism Ministers in November 2024, the focus of the global debate has shifted from AI's potential towards practical implementation challenges and risks, including questions around deployment and the reliability of AI-generated content, a shift also reflected in the APEC and G20 tourism agendas under Korea's 2025 APEC host year and South Africa's 2025 Presidency (OECD, 2026, forthcoming[13])

AI has implications for tourism marketing and product development, opening up opportunities to engage audiences and match visitor expectations more precisely, including through AI-driven insights. Integrating AI into the marketing ecosystem provides opportunities to modernise communication and create more personalised, efficient, and engaging interactions with travellers. However, it also poses a growing challenge for destinations and tourism businesses to ensure that their information is accurately captured, visible and prioritised within AI-powered applications and platforms that travellers increasingly rely on for trip planning.

Lithuania launched an AI-powered travel assistant on the Lithuania Travel website. The tool supports visitors with personalised recommendations, from top attractions and hidden gems to cultural etiquette, seasonal highlights, and local experiences. Similarly, Indonesia is integrating AI into the indonesia.travel platform as part of its Tourism 5.0 strategy, to generate personalised travel plan recommendations, provide rapid access to information while offering a richer, more responsive, and human-centric user experience, supporting data-driven decision making to optimise tourism destinations and visitor experiences. In Korea, the *Korea Guseok Guseok* ("Every corner of Korea") domestic travel information platform uses AI to innovate the entire travel process from travel exploration to dissemination of information (Box 2.3).

Emerging technologies are also helping to engage tourists with cultural heritage destinations and attractions by creating immersive experiences that preserve authenticity while making traditions accessible and meaningful to digital-native travellers (World Economic Forum, 2025[14]). The "AI Local Guides" programme in Switzerland brought together major destinations like Basel, Graubünden, Lucerne, and Zurich to develop interactive digital tour guides using AI. The AI-powered guides personalise experiences in real-time, combining local knowledge, historical anecdotes and current data. The digital guides can be made available to destinations via the Joaia app, integrated into their own applications via an API, or as a web plugin directly on websites. This flexibility allows destinations of all sizes to create and offer digital travel companions without great financial outlay.

Box 2.3. Innovating the domestic tourism process with AI in Korea

The expansion of generative AI has driven the need for continued digital transformation, keeping up with the digital demands for tourists and ensuring that tourism businesses are not left behind. The Korea Guseok Guseok domestic travel information platform uses AI to innovate the entire travel process. This includes:

- Travel exploration: Providing an AI summary of travel articles and comments to provide key information at a glance.
- Recommendations and planning: Operating travel destination and travel itinerary recommendation services tailored to the user's needs and preferences.
- Refinement: Enhancing recommendation accuracy through advanced management of data from user activities.
- Dissemination: Creating timely and trustworthy travel content based on big data from navigation systems, social media and the travel industry.

The 'AI Kokkok Travel Recommendation Service' provided by the Korea Tourism Organisation incorporates multiple safeguards to ensure algorithmic transparency and fairness, minimising both search and selection bias in its recommendation process. To eliminate search bias, content that users have recently viewed or searched is excluded from the recommendation dataset. In addition, the system operates cross-referenced recommendation models and datasets for each category through A/B testing, and monitoring of consumption and engagement rates, and adjusts content exposure by location based on these metrics. It also uses cluster-based matrix computations to provide recommendations that are specifically matched to each user segment.

In terms of big data analyses, the Korea Tourism Organisation has enhanced guidelines for data generation, including data derived from Points of Interest and Internet devices, to prevent potential bias related to age or gender. For data sources such as news outlets, online portals, Instagram, and X (formally Twitter), the analysis focuses on indirect trend indicators such as frequency of mentions and sentiment analysis, rather than highlighting specific destinations.

The emergence of these models poses the risk of demand being shaped by platforms and AI, where these technologies effectively pick 'winner' attractions or destinations. In a strategic foresight exercise, it was found that in all scenarios, digital platforms, search algorithms, and viral imagery strongly shape demand, often reinforcing volume- and price-driven, convenience-first travel. Alternative or value-driven products can struggle to gain online visibility, keeping consumer patterns locked in place despite changing traveller demand (European Travel Commission, 2025[15]).

Meaningful AI adoption requires more than just the deployment of tools. It involves strategic alignment, organisational readiness and robust data infrastructure and consumer protection measures. Governments can play a key role in overcoming systemic barriers, facilitating collaboration, and ensuring that AI serves public policy objectives such as balanced tourism development, environmental conservation and support for SMEs and smaller destinations. AI is already delivering tangible benefits across a wide range of tourism applications, including enhanced visitor experiences, strengthening accessibility and audience engagement, improving market intelligence and data use, optimising tourism operations and resource use, and supporting more effective strategic management (OECD, 2026, forthcoming[13]). However, a growing gap persists, particularly for SMEs, due to limited technical capacity and infrastructure, and fragmented data ecosystems. Addressing this disparity will be essential to ensure the benefits of AI are widely shared across the tourism sector (OECD, 2025[16]).

Persistent gaps in digital capabilities highlight the ongoing role for governments in supporting the tourism sector's digital transition. Increasingly, initiatives are being implemented to promote the uptake of digital tools and AI by tourism businesses and destinations. Colombia's "Turismo 4.0 for All" Strategy, for example, aims to accelerate the digital transformation and foster innovation across the sector through capacity building, technological solutions, and the development of new business models. The Strategy brings together projects, partnerships, and digital tools to enhance traceability, interoperability and data analytics, while encouraging participation and co-creation by communities, local authorities, tourism providers, entrepreneurs, and strategic partners. To date, 630 participants have been trained in digital competencies.

The Netherlands Digital Offensive for Tourism programme aims to strengthen the sector's digital foundation, enhancing resilience and enabling businesses to respond more effectively to emerging digital developments. Targeted at small tourism entrepreneurs, the programme combines smart AI technology with personal support. Entrepreneurs are offered a free QuickScan providing insights into their 'digital fitness', based upon which they can choose personal coaching or access to an online learning environment. Key areas of focus include as online visibility, booking systems, customer data, digital security, and marketing. In Estonia, the Tourism Software Integration and Connectivity Support Initiative promotes digitalisation and automation of tourism service providers' workflows. Through this funding mechanism businesses can adopt new resource management software and integrate it with systems such as point-of-sale and accounting tools, thereby improving operational efficiency and data quality. Training, counselling and other services to enhance digitalisation are offered to the sector by Visit Estonia and regional DMOs.

Start-ups play a relevant and increasingly important role in tourism as engines of innovation and catalysts for digital transformation. This role is particularly significant given that the tourism sector is predominantly composed of SMEs, which are often family-run, micro in size, and operate seasonally. Advancing new business models in this context requires start-ups to have access to digital tools, sector-specific data, and open platforms to foster innovation and scaling. As a result, many tourism incubator and accelerator programmes place a strong emphasis on digital transformation, with a focus on traveltech, data-driven innovation, and smart solutions to modernise tourism operations (OECD, 2026, forthcoming[17]).

France's *Tourisme Tech* initiative exemplifies this trend by supporting travel tech startups through a year-long programme that combines open innovation, mentoring, and promotion, while facilitating connections with major corporate and investment partners to accelerate the sector's digital transformation. At the same time, closer co-operation between tourism and other sectors, particularly technology, is becoming increasingly important. The integration of advanced solutions such as AI, blockchain, and data-driven tools requires bridging the gap between technology developers and traditional tourism SMEs, which often have limited absorptive capacity. For example, Costa Rica's *Conect Tourism* initiative is actively fostering matchmaking between tourism enterprises and technology providers through a dedicated platform.

Improving the enabling environment for tourism businesses

SMEs dominate the tourism sector and contribute significantly to job creation and economic growth (OECD, 2025[18]). However, the complex and fragmented nature of the sector can make establishing a supportive enabling environment for tourism businesses and in particular tourism SMEs difficult. Ensuring new and existing businesses can readily enter, operate and thrive in the sector is central to improving productivity and competitiveness while working towards the long-term goals set out in many tourism strategies.

Reducing the administrative and regulatory burden can help to support the viability of tourism businesses. Countries are now actively reviewing their regulatory frameworks and looking to streamline reporting requirements. Switzerland will introduce a digital guest registration system for the accommodation sector via EasyGov aiming to modernise the check-in process, eliminate paper forms, and reduce administrative workload for businesses. Estonia is reducing state-level intervention for Estonian accommodation providers, travel companies, and tourist information centres. Businesses will no longer be required to notify the Labour Inspectorate about the designated workplace environment specialist or have micro-enterprises submit a workplace risk assessment to the Labour Inspectorate's database.

Germany is pursuing options to reduce documentation requirements for tourism enterprises and instead focus on a risk-oriented approach with increased sanctions for infringements. It will expand the 'reality check tool' and implement it across various areas of the sector. This involves a practical check, working with entrepreneurs and relevant enforcement authorities, to examine processes from start to finish, analyse bureaucratic obstacles, and develop practical solutions. Latvia has streamlined requirements to reduce both the volume and frequency of reporting. These ongoing actions aim to create a more efficient regulatory environment, enabling tourism businesses to focus on service quality, innovation, and long-term growth. Sweden recently replaced the need for a hotel permit when starting or taking over a hotel business with an easier application procedure. It is also exploring opportunities to reduce the regulatory burden and associated costs for businesses to increase tourism growth, jobs and tax revenues.

SMEs face a restrictive financing environment, including in the tourism sector. Economic uncertainty and relatively high borrowing costs continue to contribute to sluggish SME credit growth, weighing on liquidity and investments, with implications for competitiveness (OECD, 2026[19]). Tourism SMEs and entrepreneurs face particular challenges. Credit conditions are tighter than for SMEs on average, which already face less favourable terms than larger firms. This reflects market perceptions of tourism businesses as more risky than other firms, and lack of collateral required to guarantee the finance need (OECD, 2017[20]). Support for entrepreneurs and SMEs can bring new opportunities to the tourism sector as it adapts to new policy priorities and changing technologies.

A recent OECD review of the enabling environment for micro and small tourism enterprises in Greece identified access to finance was one of six key dimensions with the potential to act as drivers (or barriers) to starting, maintaining or expanding business operations (OECD, 2025[21]). Examples of government support include the Revolving Fund for Enterprises to Support Tourism in Italy, which provides non-repayable grants and subsidised loans to improve tourism services and facilities and promote upgrades, digitalisation, sustainability and resilience for projects valued between EUR 500 000 and EUR 10 million. The Tourism Growth Programme in Canada funds projects that provide added value to existing activities in the tourism sector, helping to leverage tourism opportunities in communities, including those in rural and remote areas, while focusing on business and economic growth. In Hungary, the Tourism Bank was established in 2025 to provide favourable loan schemes to tourism enterprises, enabling them to expand, modernise, and improve the quality of their services.

In recent years, incubators and accelerators have been increasingly recognised as tools to improve the effectiveness and availability of entrepreneurship support and stimulate innovation. The OECD International Compendium of Entrepreneurship Policies identifies incubation and acceleration as one of three main policy interventions to foster entrepreneurship (OECD, 2020[22]). Tourism-specific incubation and acceleration is particularly relevant given tourism's fragmented value chains, strong seasonality, local embeddedness and cross-cutting regulatory and market conditions. There is a growing but still selective presence of tourism-specific incubators, often with a strong digital transformation focus (Box 2.4). Although the tourism innovation landscape has matured considerably in recent years, there is a need for more coherent, long-term and problem-driven incubation and acceleration that can better connect programmes, address thematic blind spots and strengthen the sector's capacity to manage deeper transformation (OECD, 2026, forthcoming[17]).

Box 2.4. Fast-evolving support landscape of tourism incubators and accelerators

The mapping of around 70 tourism incubators and accelerators across OECD countries and EU Member States reveals a multiple and fast-evolving support landscape, including the following highlights:

- Start-up support spans European-level schemes, national initiatives that translate tourism strategies into practice, and local programmes that address place-based challenges and provide access to core business services.
- Across different programme models, there is a clear alignment with policy priorities, most notably digitalisation and sustainability, often reflected in thematic focus, partnerships and the types of services offered.
- Most tourism initiatives prioritise short, early-stage interventions (e.g. challenges, competitions and bootcamps), while a smaller set of longer programmes supports sustained development and market traction over time.
- Public-private co-operation is a recurring element, including structured matchmaking with established firms within and beyond tourism, especially with the tech sector.

Source: (OECD, 2026, forthcoming[17])

Portugal is actively working to strengthen the ecosystem supporting tourism SMEs, through a combination of public and private initiatives. Business capacity-building and incubation programmes offer technical training, mentoring, and access to strategic tools to help small enterprises professionalise and scale operations. Initiatives are also being launched to encourage the aggregation of micro-enterprises into collaborative networks and clusters, especially in territories where fragmentation has hindered growth and diversification. Denmark plans to continue development of the Hub for Innovation in Tourism, a national initiative, which aims to strengthen the tourism sector and enhance competitiveness by connecting startups with established tourism operators. First developed in 2021, the Hub helps entrepreneurs test, develop, and market their solutions in the dynamic landscape of tourism.

In Peru, a public innovation laboratory known as the MINCETUR Lab has designed and implemented a new modality within its national programme *Turismo Emprende* to address the idea creation and business model design phase in the entrepreneurship cycle. This new approach incorporates intensive training, early-stage validation, and the application of emerging technologies into the creation of tourism ventures. It aims to build entrepreneurial capacity from the ground up, ensuring that projects are more robust, market-aligned, and grounded in sustainability and innovation from the start. France Tourism Tech supports around ten start-ups annually to develop solutions based on innovative technologies applied to tourism, such as AI, big data, cloud computing, Internet of Things (IoT), immersive reality, blockchain and cryptography, cybersecurity, and new mobility. The start-ups receive support from around 60 public and private partners, including major corporations, investors and institutional stakeholders in the early stage of their business development.

Tourism can provide opportunities for populations in rural and remote areas if adequate infrastructure and services are available to attract and cater to tourists. This can help address some of the structural challenges faced by populations in these areas, such as fewer economic opportunities and limited access to basic services compared to urban areas. Austria is providing funding to assist the development of business plans addressing the strengths, weaknesses, opportunities and threats of a recent or impending succession processes for SMEs. The goal is to prevent small, often family-led hotels, restaurants and other tourism businesses in rural areas from closing when the current owner or operator retires. This subsidy aims to make it more attractive for potential successors, often the children of the current owners, to continue the business.

A vibrant tourism economy needs to have access to the skills and workforce to provide a quality and competitive tourism offer. AI and the accelerating pace of digitalisation are changing the nature of work and the skills needed within tourism. The private sector has a lead role in addressing these issues, by implementing measures to change those factors within its control, while working closely with government, which creates the framework conditions (OECD, 2024[1]). Current policies to address tourism workforce issues occur across three key areas:

- Promoting the tourism sector as an employer: better promoting the sector as a career pathway to young people either in schools or through promotional campaigns.
- Improving the skills of tourism workers: upskilling and reskilling the tourism workforce with free and subsidised training, including through new training portals, and the modernising of tourism education, to better meet the needs of tourism businesses.
- Enabling access to international workers: adapting immigration policies to increase the limits for tourism workers, where considered appropriate, or to add tourism jobs to skilled labour policies.

To address ongoing skills shortages, the United Kingdom introduced the Hospitality Skills Passport, a digital pass which can be added to CVs to show employers that jobseekers have the skillset required for specific roles. Malta is implementing a national certification system, 'Skills Pass', which aims to ensure hospitality and tourism workers have the skills, knowledge and attitude to deliver quality service. The Skills Pass sets a clear benchmark for competence and candidates need the Pass to move forward in the recruitment or work permit process. Malta is also introducing a training programme for existing tourism employees and promoting tourism-related career opportunities to students. Germany is seeking to address tourism workforce shortages with a more modern working time law to make working hours more flexible. This new law will have a weekly instead of a daily maximum working time to create room for a variety of working time models, like those in the tourism sector.

Diversifying the tourism economy for balanced tourism development

Tourism, when well-managed, can serve as a powerful catalyst for community development, enhancing resilience and empowerment, while preserving natural and cultural resources. However, existing models of tourism development often result in unevenly distributed impacts (OECD, 2024[23]). Such imbalances can have significant environmental, economic, and social consequences for local communities. In some destinations, overcrowding is placing visible and structural pressure on infrastructure and quality of life. While frequently framed as a tourism issue, these challenges often stem from deeper systemic factors, including underinvestment in infrastructure, inadequate planning, and fragmented governance. This is also explored in more depth in Chapter 3.

Spreading demand away from existing tourism hubs and peak seasons can serve the dual purpose of tackling overcrowding in popular destinations and attractions, while also stimulating regional economies (OECD, 2021[24]). To reduce regional disparities, the Slovak Republic is providing support to develop tourism in under-visited and rural areas through targeted grant schemes and infrastructure investments. Funding is focused on developing cultural, nature-based and wellness tourism products that attract visitors beyond traditional destinations and peak seasons.

Infrastructure is central to the competitiveness and balanced development of destinations, with transport and digital infrastructure particularly important in rural areas. New Zealand's Great Rides cycle-trail network draws visitors into more remote areas, attracting over two million users annually, and contributing over NZD 1.28 billion into regional economies. Similarly, Slovenia's National Intelligence System for Tourism (NiST) uses live data to monitor flows and redirect tourists toward less-visited destinations. In

Israel, a targeted incentive programme offers capital grants of up to 20% of construction costs for new hotel construction or expansion projects outside of the already popular destinations, Tel Aviv and Herzliya. With a budget of around ILS 200 million, the scheme aims to support increased accommodation capacity while promoting regional diversification.

Targeting specific markets or tourism segments can also play an important role in managing tourism. In Europe, research indicates that older European travellers drive demand for different forms of travel, such as wellness, off-season travel, rural escapes, and accessibility-driven offers. These trends can create opportunities for underused regions to attract visitors with slower-paced, off-season, and less commodified experiences (European Travel Commission, 2025[15]).

Large-scale events are increasingly being used to showcase emerging destinations and spread the benefits of tourism more widely. Such events are often accompanied by significant infrastructure investment which, if effectively planned and managed, can help the development of destinations. The FIFA World Cup 2026, co-hosted by Canada, Mexico and the United States, is being staged across multiple cities in the co-host countries Canada, Mexico and the United States, with a key objective of leveraging global demand to stimulate tourism across all host regions (Box 2.5). Latvia similarly views large-scale events as a catalyst for attracting new visitors and to showcase the country as an active year-round destination. These events are seen as an opportunity to foster synergies across regions and sectors, raise the profile of the country and generate broader economic benefits. To support this approach, Latvia approved an initiative in 2025 to grant state budget co-financing for large-scale events and international film productions with the aim of stimulating tourism and maximising the associated economic spillovers.

Box 2.5. Using the 2026 FIFA World Cup to showcase tourism destinations in the United States

During the FIFA World Cup 2026 co-hosted by Canada, Mexico and the United States, 78 of the matches are taking place across 11 cities in the United States. The event is expected to significantly boost local businesses, infrastructure development, and job creation, with FIFA estimating that the event could generate up to USD 6.4 billion in tourism spending across the country. The US Government, in co-ordination with Brand USA, is working to leverage its hosting of the FIFA World Cup to position the country as the premier destination for global sporting events and to encourage visitation to the host cities and beyond by offering potential itineraries. Visitors are expected to attend games, base camp locations and fan events across the country – increasing the overall economic gains. Existing country-specific travel competitiveness data can be utilised to recommend targeted marketing strategies to host cities and destination management organisations with the goal of increasing average attendance and travel revenue during the event. The United States intends to measure the impact from international visitors to the 78 US-hosted matches by leveraging existing data sources like the Survey of International Air Travelers (SIAT) to measure international visitation, economic impact, and traveller characteristics. This information will help destinations quantify the cost-benefit ratio of hosting the FIFA World Cup and other major sporting events, and support destinations to plan for future international events.

At the destination level, targeted national support is needed to better manage visitor flows and address tourism imbalances. In Iceland, managing unbalanced tourism distribution and pressure remains a key priority. Provisions are being developed to better manage access, safety and site-specific conditions at tourist destinations, including planning and risk management considerations. Austria created the guide “Find the Right Balance” to support regional decision makers to address imbalances in tourism, accompanied by assistance to design tailor-made solutions across seventeen pilot regions. These projects were selected under a funding call with a focus on addressing tourism imbalances using mobile phone data, weather data and AI to improve visitor flow management, alongside promoting sustainable modes of transport and developing tools to measure the sustainable development of tourism destinations. Building on its National Strategy for the Management of Tourist Flows, France has also launched a study on measuring international tourist flows and established a dedicated community of practice focused on the smart management of tourist flows (Box 2.6).

The increased focus on balancing tourism flows has renewed discussion around the concept of carrying capacity and its potential to inform destination management. While there is no universally agreed approach or methodology to determine the carrying capacity of tourism destinations, efforts in this area can help to determine critical thresholds and guide trade-offs to achieve more balanced outcomes. To strengthen its approach to managing tourism and visitor flows, Costa Rica is developing a methodology to assess the 'maximum acceptable capacity of tourists' a national level and across its 33 tourism development centres.

Digital tools, and the rich data they generate, offer significant opportunities to better understand and manage the movement of people. Across regions in Japan, initiatives are being implemented to promote sustainable tourism, including the analysis and visualisation of congestion patterns through the use of digital technologies.

Box 2.6. Managing tourist flows in France

In France, 80% of tourism activity is concentrated in 20% of the territory. Peaks in visitation are quickly reached in certain territories in the main tourism season. These peaks pose a threat to the preservation of the environment, the quality of life of residents, and tourist experiences and have made measuring tourism flows a priority. Key initiatives to measure and manage tourism flows include:

- The National Strategy for the Management of Tourist Flows was adopted by France in 2023, complementing the national tourism strategy. It aims to preserve the balance between the development of local economic activity and the sustainability and preservation of tourist sites.
- 25 pilot sites were selected under the Strategy, to strengthen the observation of flows in each territory and support the development of management strategies adapted to local specificities, including through measurement tools and a survey to measure resident acceptance of tourist flows. A practical guide has been developed, gathering key insights and concrete case studies to support flow management. An evaluation phase of the Strategy was launched at the end of 2025.
- A study has been launched to better understand the challenges of measuring international tourist flows by comparing the observation systems in France, the United Kingdom, and Spain. In a second phase, the study will provide recommendations to optimise the revenue that France can generate from international tourism.
- A special-interest community focused on smart management of tourist flows was launched in July 2025. The community is designed to foster disruptive innovations in the tourism sector through collaborative work among academic stakeholders, major corporations, and tourism professionals. It aims to identify emerging technologies that can address specific needs and uses, paving the way for new models.
- The development of concrete actions to encourage public and private actors to make available their data on tourism flows.

Promoting seamless and resilient tourism transport

Transport is an integral part of the tourism experience, and a major source of its environmental footprint (International Transport Forum, 2024[25]). Indeed, recent disruptions to global air travel linked to conflict in the Middle East further underscore the importance of resilient and well-co-ordinated transport systems. In a sector fundamentally dependent on the physical movement of people, effective co-ordination between transport and tourism planning is essential. An integrated approach can help provide seamless connections across different modes of transport to benefit both visitors and residents, and improve destination connectivity and accessibility. With around 75% of the sector's emissions stemming from transport, and air travel alone contributing 40% (International Transport Forum, 2024[25]), integrated approaches can also encourage a shift toward lower-impact and more energy-efficient transport options (OECD, 2020[26]).

For countries aiming to provide seamless, multimodal, and energy-efficient mobility, investment in technological innovation and infrastructure is a key priority, closely linked to destination management and connectivity. In Sweden, the National Plan for Transport Infrastructure for 2026–2037 prioritises investment in the road network, including the expansion of charging infrastructure to support more sustainable tourism in both urban and remote areas. The Swedish Transport Administration is also developing a strategy to align the national railway system with the European Rail Traffic Management System by 2042. The Rail Baltica initiative, spanning Estonia, Latvia and Lithuania, aims to integrate regional rail infrastructure into the wider European rail network. In 2025, the project entered a phase of large-scale construction with a key design contract signed for the Poland–Kaunas connection, marking a major step in cross-border integration. Similarly, Chile, is investing in improvements to its national road network to close critical gaps that currently hinder access to areas with high tourism potential, to support the geographical de-concentration of tourist flows and enable the development of destinations across the country.

Large-scale infrastructure investment can significantly strengthen the tourism transport system, supported by integrated ticketing systems that streamline the booking of transport across modes and borders. The European Commission's Multimodal Digital Mobility Services initiative aims to advance the development of seamless ticketing services across passenger transport modes to improve multimodality, accessibility and sustainability within and between EU Member States. A complementary proposal is being developed to reduce market fragmentation and ensure access to a comprehensive range of transport offers across the EU. This initiative will be closely linked with the Single Digital Booking and Ticketing Regulation, which seeks to expand the availability of rail tickets on digital platforms and make it possible for passengers to book multi-operator rail journeys in a single transaction, while maintaining full passenger rights throughout the entire trip. At sub-national level, integrated and multimodal ticketing can also simplify access to public transport, making it a more attractive option.

Transport within destinations also remains a key component of the tourism experience. The transition to electric and other energy-efficient transport options depends on the availability of supporting infrastructure, including accessible public transport systems, optimised routing, and the promotion of active and low-impact ("soft") mobility options. Denmark is advancing efforts to reduce tourism-related carbon emissions by expanding infrastructure for electric vehicles, promoting cycling, and supporting the electrification of busses and canal boats in Copenhagen. At the same time, tourists are encouraged to make more environmentally friendly transport choices during their stay in Denmark. Similarly, the Slovak Republic is investing in low-emission transport solutions such as cycling infrastructure and improved public transit links to tourist sites. In Slovenia, a proposed policy on accessibility and sustainable mobility aims to significantly reduce emissions from tourism by prioritising measures such as reducing reliance on fossil fuel-based private vehicles, upgrading integrated public passenger transport to better meet tourism needs, and redefining accessibility priorities based on carbon intensity per passenger and the value added of different markets. The policy also emphasises the need to maximise the positive impact of transit tourists and highlights the importance of effective mobility management.

In Europe, the Partnership on Sustainable Tourism Mobility, which is led by Austria as part of the Transport, Health and Environment Pan-European Programme, has developed guidance to provide responsible national authorities with climate-friendly approaches to transport and tourism. The framework outlines clear actions and recommendations to improve mobility in tourism, concrete case studies and innovative approaches to help national governments integrate low-emissions and efficient mobility solutions into their policies and activities.

Tourism transport is often considered synonymous with aviation, which is a significant and growing contributor to global emissions. Technological innovation, including the development and production of sustainable aviation fuels (SAF), represents one lever to reduce transport emissions. However, there are severe limitations to scaling up SAF to the levels needed (Becken, Mackey and Lee, 2023[27]; International Transport Forum, 2024[25]). As such, countries may also seek to explore alternative transport options such as high-speed rail, electric aircraft, and hydrogen technologies. According to International Transport Forum projections, reducing aviation emissions will increase ticket prices, by potentially on average 25-30% by 2060 (International Transport Forum, 2024[25]).

Following recent crises, a priority for many countries continues to be restoring and expanding aviation networks to increase connectivity. In light of recent aviation disruptions in the Middle East, an emerging priority in some countries is also to reduce over-reliance on regional hub carriers by expanding connectivity options and strengthening alternative air transport corridors. Lithuania aims to improve year-round connectivity, especially air routes with major European hubs, building on strong recent passenger growth, expanding route networks and frequencies, while remaining attentive to emerging operational risks that could affect future capacity and demand. This follows infrastructure upgrades in recent years such as the expansion of Vilnius Airport capacity, alongside continued network development and efforts to better distribute tourism flows across the country.

More work is needed to balance and offset increased aviation connectivity to reduce the overall impact of tourism on the environment. New Zealand's Aviation Action Plan, released in 2025, outlines a shared ambition between industry and government to grow a future-proof aviation sector, and an initial set of 25 actions to support progress towards this ambition. Along with actions to foster a supportive regulatory framework, build a skilled workforce, promote innovation and ensure infrastructure supports efficient and sustainable movement of people and goods, the Action Plan contains several actions under an ambition to encourage the use of resource-efficient energy, in line with New Zealand's path to net zero by 2050.

Tourism transport also depends on the provision of safe and seamless mobility to enhance destination competitiveness and improve the traveller experience. This can be achieved through measures such as simplifying visa requirements and application processes, introducing digital traveller identity and biometric systems, strengthening multimodal transport and connectivity, and improving the availability of information and assistance to visitors (OECD, 2020[26]). The United States is leveraging advanced technologies and mobile applications to transform inspections at airports into a seamless, touchless process, enabling faster risk identification and efficient processing of legitimate visitors. Meanwhile, Egypt is relaunching its visa system to integrate all types of tourism visas to simplify entry for international travellers.

Addressing the environmental pressures shaping tourism

Tourism both impacts and is highly dependent on the quality of the environment. Changing seasons, extreme weather events, and rising sea levels are increasingly reshaping travel patterns, with potential structural implications for some destinations and for global travel flows more broadly. The sector is highly exposed to multiple, often cumulative, impacts, as evidenced in recent years by extreme temperatures, heatwaves, wildfires, floods, and other extreme weather-related events which have impacted visitors, businesses, and communities world-wide. The consequences of these events extend beyond the immediate damage to infrastructure and natural assets, also impacting the functionality, resilience and recovery of destinations, as well as increasing operational costs and risks for tourism businesses. They can also significantly influence the health and comfort of tourists and workers, alter the geography and seasonality of tourism demand, and require more proactive adaptation and resilience planning at destination level (OECD, 2024[23]; European Travel Commission, 2025[15]). These issues are further explored in Chapter 4.

Many countries are implementing initiatives to prepare for and address the impacts of changing seasons and extreme weather-related events. These efforts range from targeted projects and local interventions to comprehensive tourism-specific adaptation plans aligned with broader national adaptation plans. For example, Chile has developed a Climate Change Adaptation Plan for the Tourism Sector, approved in November 2024, which aims to strengthen the sector's capacity to address climate change through enhanced intersectoral co-ordination and proactive risk management. Ireland has similarly developed a Tourism Sectoral Adaptation Plan, designed to support communities, ecosystems, and businesses in adapting to rising risks and building long-term resilience (Box 2.7).

Box 2.7. Implementing a tourism climate adaptation plan in Ireland

Ireland has recently experienced multiple high-profile extreme weather events that have underscored the need for effective adaptation measures to build resilience to the impacts of a changing climate. This has led to the development of Ireland's first Sectoral Adaptation Plan dedicated to the tourism sector.

The Plan seeks to identify both the challenges and opportunities presented by a changing climate, with the aim of maintaining Ireland's appeal to tourists and supporting resilient communities through employment and economic growth. Implementation of the Tourism Sectoral Adaptation Plan prioritises reducing the consequences of the climate related hazards identified by the National Climate Change Risk Assessment for the sector. The Plan sets out three goals for the next five years:

- Increase the tourism sector's understanding of the relationship between climatic variables and the tourism sector to improve the sector's ability to address the impacts of climate change.
- Build a shared awareness of climate change, its impacts, and necessary steps to develop resilience across the tourism sector in Ireland, particularly amongst tourism-dependent communities.
- Build resilience to reduce the consequences of the most significant climate risks faced by the tourism sector.

The implementation of the Plan will be led by the Department of Enterprise, Tourism and Employment and its tourism agencies. It contains a number of actions to achieve the goals, including researching to define baseline and climate resilience targets for the sector, performing a skills gap analysis regarding adaptation across the sector and developing a tailored training plan, updating tourism surveys where required, raising awareness about the impacts of climate change, including in destinations and with businesses, and incorporating climate adaptation into tourism strategies.

Portugal is preparing a Climate Agenda for Tourism 2025-2030, an action plan focused on decarbonising and strengthening the sector's resilience. The Agenda seeks to advance the transition to a low-emission, resilient, and regenerative tourism, that generates economic, social, and environmental value, while reinforcing Portugal's competitiveness as a destination. The Slovak Republic is also advance climate action in tourism through targeted funding, awareness-raising, and planning tools, with initiatives aimed at embedding more resource-efficient practices into day-to-day operations and supporting the shift to a low-carbon economy. The Netherlands is working to build a climate-resilient hospitality sector by mapping the risks and translating these insights into targeted recommendations and action plans for businesses and public authorities. In Switzerland, the *Kompass Schnee* programme supports winter destinations in developing adaptation strategies using scientific data and a digital tool, while the Adapt+ funding programme, introduced in 2025, provides dedicated support for climate adaptation in tourism, with a focus on diversifying offerings and strengthening year-round destination resilience.

Achieving meaningful reductions in the environmental impact of tourism requires significant changes by businesses of all sizes across the tourism ecosystem. This includes transitioning from traditional linear models towards more resource-efficient approaches that minimise waste, reduce energy and resource consumption, support the regeneration of natural assets, and prioritise more efficient and lower-impact transport modes. To foster this shift, tourism businesses require clear guidance and practical support on the steps they can take. Australia's Sustainable Tourism Toolkit for Businesses provides practical, easy-to-understand guidance structured around four pillars, including one focused on "implementing environmental and climate actions". Under this pillar of the Toolkit, businesses are provided with steps to measure direct and indirect emissions, reduce energy and water use, improve waste management, consider transport options, adapt to a changing climate, support biodiversity and regeneration, improve air quality, and engage responsibly with wildlife.

Greece is promoting a model of circular economy in tourism enterprises through tourism education and initiatives focused on zero waste, the use of alternative sources of energy, waste reduction and recycling, and the promotion of local products. The Sustainable Travel Finland programme aims to raise awareness among tourism operators of biodiversity issues, including the potential impacts of their own activities. In 2024, a toolkit was developed to help tourism businesses better integrate biodiversity considerations into their operations. Finland is also adopting a "nature positive" approach that seeks to minimise environmental harm and actively invest in nature restoration in tourism destinations. At European level, the Cross-Re-Tour project supports SMEs by providing access to knowledge and tools related to green, digital and circular economy practices to improve operational performance. These solutions, which are often used in other industries or by larger tourism players, are being tested, implemented, and scaled through the project's Open Innovation Programme.

At international level, the Global Tourism Plastics Initiative (GTPI) provides a framework to support tourism stakeholders transition to more circular approaches to plastics use. Led by the United Nations Environment Programme (UNEP) and UN Tourism, the initiative requires signatories to commit to eliminating unnecessary plastic packaging; substituting essential plastics with reusable, recyclable or compostable alternatives; and collaborating and investing to increase recycling and composting rates for plastics. GTPI initiatives include a pilot workstream to identify and promote reusable alternatives to problematic plastic items in tourism operations, with technical training sessions offering practical solutions, business cases, and strategies to engage staff and clients (UN Tourism, 2025[28]). Similarly, the One Planet Network launched its Recipe of Change initiative on the International Day of Zero Waste 2026, providing tourism stakeholders with a practical framework to translate global ambitions on food waste reduction into measurable action to contribute to the global effort to halve food waste by 2030.

Tourism policies aimed at reducing environmental impacts require a stronger, more timely and granular evidence base. Existing official tourism indicators are often highly aggregated and subject to significant time lags, limiting their usefulness for monitoring environmental performance, especially at the tourism business or destination level. In response, countries are developing tailored tools and methodologies, including environmental calculators, to fill these gaps. Under the Türkiye Environmental and Cultural Sustainability Program, a voluntary carbon footprint calculator has been developed to support accommodation facilities in aligning with the programme's environmental sustainability criteria. Available free of charge to authorised users, the tool allows businesses to measure and analyse emissions using a standardised methodology. The resulting data helps identify opportunities to improve resource efficiency, optimise operations, reduce impacts, and strengthen sustainability management.

Broadening participation and unlocking the potential of accessible tourism

Broadening participation and making tourism experiences more accessible can deliver wide-reaching benefits for regional economies and the quality of life of visitors and residents. Improving accessibility offers a dual opportunity: to spread the benefits of tourism and tap into a growing market with significant potential, including aging populations, while responding to demographic change and evolving accessibility needs. Within countries, the tourism sector can create economic opportunities for people of all ages and backgrounds across urban and rural communities. As the value of accessible tourism becomes increasingly recognised, governments are introducing targeted policies to address key barriers and unlock these opportunities. The G7/OECD policy paper on creating economic prosperity through Tourism, endorsed the G7 Tourism Ministers under Italy's 2024 G7 Presidency, highlights the importance of supporting accessible approaches to the design and development of tourism products and services to take advantage of the positive social and economic impacts (OECD, 2024[23]).

People requiring mobility assistance present a significant opportunity for the tourism sector but often depend on specific infrastructure, tailored services and targeted adjustments from destinations and businesses. Innovative approaches to the design and delivery of tourism products, services, and infrastructure can make tourism more accessible to all. In Korea, accessibility is being strengthened through enhancements to the physical environment alongside efforts to fostering greater awareness and cultural maturity, including with the development of Open Tourism Destinations to address barriers faced by visitors. These destinations will focus on enhancing physical connectivity and improving access to key components of the tourism system across regions, such as transportation, hospitality, accommodation, and information services, while responding to evolving and specific accessibility needs. In Israel, dedicated grants support accessibility for people with disabilities at major tourist sites and the development of infrastructure in peripheral areas through the Accessibility Budgeting Procedures for Tourist Sites 2024-2025 and the Public Tourism Infrastructure Development Procedure 2025.

Germany aims to provide 'socially responsible tourism that makes travel open to all' and has implemented the Tourism for All national labelling system for accessible services. This scheme is based on comprehensive criteria to ensure high cross-sectoral quality standards, and was developed in co-operation with relevant affected persons and tourism associations. Peru has developed "Guidelines for the Development of Social Tourism in Peru" which sets out seven strategic lines of action: research and planning, design and development of accessible products, awareness and communication, capacity building, demand facilitation, institutionalisation and monitoring, and evaluation. Peru has also published the technical document "Accessibility Guide: Tourism for All" which provides practical recommendations for tourism service providers and site managers to design and adapt tourism experiences that enable broader participation, while supporting the right to leisure, rest, and an improved quality of life.

Alongside the development of accessible infrastructure and tourism products, it is equally important that the relevant information is readily available and effectively communicated to travellers with accessibility needs. To support this, Greece is introducing new quality labels to identify Accessible Tourism Destinations and Accessible Tourism Enterprises. In France, a Hackathon on "Making Tourism Accessible for Persons with Disabilities" organised as part of wider work on a Tourism Data Roadmap focused on improving the availability and use of information for visitors through existing public tourism data. The event brought together around 60 participants over two days, resulting in three winning projects that proposed innovative ways to use existing datasets to better support persons with disabilities. These projects were subsequently presented to a wider audience, including key stakeholder from the tourism and data ecosystems, at an event in 2025.

There is a growing recognition of the positive impacts that access to tourism can have on people's quality of life. In response, many countries provide financial assistance to enable residents to participate in tourism where this may otherwise have been out of reach. In Costa Rica, the adoption of the Tourism for All Law recognises tourism as a right to rest, leisure, and recreation. The associated Tourism for All programme seeks to expand access to tourism for people with limited financial means and for people with disabilities. In operation since 2024, this programme has supported more than 1 000 tourists, in co-operation with the tourism sector.

As a major employer of all population groups, the tourism sector builds social capital and supports broader economic and community outcomes, including in rural and remote areas. In Belgium, the region of Wallonia launched a workforce development programme to encourage the recruitment of young people, women, and other target groups. Australia's 'Choose Tourism' programme was designed to attract people to work in the sector across 2022-24, with a communications campaign delivered to encourage employers to consider employing young and more mature people, First Nations Australians, and people living with a disability. The Tourism Local Navigator Pilot, undertaken in 2023-24, supported tourism businesses to employ people with a disability, with the pilot engaging around 1 600 businesses and delivering more than 160 employment outcomes.

Mobilising financing and investment for tourism development

Financing and investment are needed to build a competitive and resilient tourism sector that keeps pace with the digital transition, reduces environmental pressures, and maximises benefits for local communities, while supporting long-term economic growth. Continued growth in tourism demand will require sustained investment in infrastructure and services to better manage rising visitor volumes, deliver seamless experiences, and respond to evolving consumer preferences, while limiting pressures on host destinations. A co-ordinated approach that mobilises the private sector investment, supported by enabling public policies and funding mechanisms can help strengthen destination resilience and competitiveness, while generating broader economic benefits.

New and alternate funding streams, beyond traditional public budgets, are increasingly needed to finance the infrastructure and services required to accommodate growing tourism demand while reducing pressures on communities and the natural environment. In 2025, Norway adopted an Act on Visitor Fees enabling municipalities experiencing high tourism pressure to levy visitor fees to help finance tourism-related public goods. Revenues are earmarked for local use, with the municipalities required to prepare and submit plans for how the funds will be allocated, for approval by the Ministry of Trade, Industry and Fisheries. Iceland plans to introduce a resource and infrastructure fee at publicly owned nature sites. The fee is intended to support the development, maintenance and conservation of destinations, while also contributing, in part, to research and destination marketing at the national level. To support conservation and development of tourism infrastructure, New Zealand collects an International Visitor levy from most international arrivals. Chile has introduced a 1.25% accommodation tax for inbound tourists that will finance the new International Tourism Promotion Fund under its Tourism Reactivation and Audiovisual Industry Promotion Bill. Colombia and Japan collect an international passenger tax which is used to fund tourism-related programmes. In Japan, plans are underway to effectively triple the departure tax for all travellers leaving Japan from JPY 1 000 to JPY 3 000 as part of efforts to create a more balanced tourism model.

Attracting private investment is fundamental to delivering a high-quality and competitive tourism offer. Tax incentives, favourable development regulations and the promotion of specific investment opportunities are strategies being used by countries to attract high-value investment from private companies. Stimulating private investment to mobilise tourism development and support the efficient use of resources is a key priority of many national tourism strategies, including Denmark's Pathways to Sustainable Tourism Growth, Hungary's National Active Tourism Strategy, and the Strategy of Slovenian Tourism 2022-28.

Montenegro introduced a range of fiscal, tax and regulatory reforms to streamline pre-investment procedures to obtain permits and facilitate project development. To incentivise investment in high-quality accommodation, investors are exempt from paying import VAT on goods and services used in the construction of five-star hotels, while property taxes are reduced by 30% for four-star hotels and 70% for five-star hotels operating year-round. Egypt is also pursuing an ambitious investment strategy to expand its tourism capacity, with a target to increase the number of hotel rooms from approximately 228 000 rooms in 2024 to nearly 500 000 rooms by 2030. As part of this effort, Egypt is also launching a flagship Tourism

Investment Map, designed as a dynamic platform to highlight investment opportunities across the sector and provide regularly updated information to investors.

Argentina has worked with UN Tourism and the Development Bank of Latin America and the Caribbean to develop a guide to showcase the country's investment potential. The guide highlights key regional assets, competitive advantages, and available tax incentives at both federal and provincial level, alongside recent regulatory reforms aimed at encouraging economic openness and private sector participation. It also includes 25 concrete investment opportunities. Complementing this, the Private Tourism Investment Promotion Programme provides a dedicated digital platform that centralises information on sector-specific incentives, investment opportunities and financing instruments available for tourism projects.

Government grants and subsides are another tool to help stimulate targeted tourism investment, particularly for the modernisation of infrastructure, the adoption of new technologies and the development of skills. The Slovak Republic established the Tourism Support Fund with the objective of developing and modernising tourism infrastructure. In 2025, a funding call was launched with a total allocation of EUR 19 million, offering support of up to EUR 500 000 for tourism projects to strengthen the competitiveness of tourism across regions. The programme supports initiatives that contribute to the economic, environmental and social performance of tourism, as well as the construction, modernisation and reconstruction of resilient tourism infrastructure. Eligible activities included the development of cultural, recreational, natural and sports infrastructure, improvement to local visitor facilities, creation of tourism routes, support for health tourism, and investment in water-based recreational infrastructure.

Morocco's "Go Siyaha" programme aims to support more than 1 700 projects by 2026, with the goal of strengthening the leisure and entertainment offer, diversifying the tourist experience, and enhancing the sector's competitiveness. Capitalising on more than 1 000 projects already underway, the programme was updated in July 2025 to support more high-impact tourism initiatives. Key enhancements include the removal of the minimum investment threshold, allowing projects under MAD 1 million to benefit from support, expanded support for existing businesses looking to develop new offerings, and the provision of technical assistance from the start-up phase to help structure projects and facilitate access to financing.

As previously noted in this chapter, small businesses and SMEs in particular continue to face constraints in accessing the financing needed to support their transition to more resource-efficient and digitally enabled operations (OECD, 2026[19]). Despite the availability of a wider range of private and public financing instruments, access to finance remains a persistent challenge in the sector. There is scope to encourage greater uptake of economy-wide financing instruments, while also developing targeted instruments that address specific tourism-related needs, without duplicating broader SME support frameworks. At the same time, more needs to be done to strengthen the financial literacy, capacity and preparedness of tourism SMEs and entrepreneurs to access and effectively use available financing instruments.

Steps are now being taken to integrate environmental and social considerations into tourism investment decision making frameworks and financial reporting mechanisms. In Austria, new funding guidelines for tourism SMEs launched in 2023 include a sustainability bonus of 3.5% (as of July 2025) in additional funding up to EUR 175 000 for investments aligned with ecological, social and economic objectives. The funding scheme is administered by the Austrian Bank for Tourism Development (OeHT), which also provides tourism SMEs with a 3% interest subsidy for projects that meet specific ecological requirements, such as thermal rehabilitation, changing heating systems to renewable energy, introducing new energy-efficient devices, or undertaking measures to undo soil sealing. In parallel, Austria has developed a set of key performance indicators tailored to the tourism sector to support ESG measurement, responding to the growing demand from financial institutions requiring businesses to provide robust sustainability reporting for investment and financing decisions.

Denmark introduced new sustainability reporting on certified tourism businesses, with support provided to SMEs and entrepreneurs to meet new requirements. The goal is to have 70% of all accommodation establishments and amusement parks achieve baseline certification by 2030. In Ireland, under the Tourism

Sectoral Adaptation Plan, all future Fáilte Ireland schemes providing financial assistance will include specific conditions and measures related to climate adaptation from 2027. In Belgium, the region of Wallonia is also shifting away from general subsidies toward more structured funding mechanisms that prioritise projects aligned with environmental and social objectives, alongside the development of a platform to co-ordinate initiatives and facilitate the exchange of best practices.

Spain has invested over EUR 3.4 billion as part of the Plan for the Modernisation and Competitiveness of the Tourism Sector, financed under the Recovery and Resilience Facility, a flagship instrument of Next Generation EU. Actions were aimed at transforming the tourism model towards sustainability, promoting digitalisation and intelligence for destinations and the tourism sector, and strengthening the overall competitiveness of destinations.

As such reporting requirements become more prominent, SMEs will require clearer frameworks and practical tools to address data collection and reporting challenges (OECD, 2025[29]). Providing accessible guidance and user-friendly digital solutions can help smaller businesses to collect the relevant information and comply with emerging standards, while avoiding disproportionate administrative burdens.

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Chapter 3. Enhancing the social benefits of tourism

Tourism plays an important role in shaping the economic prosperity and supporting the well-being of local communities through jobs, income and investment. However, its impacts are not always evenly distributed and, if not well-managed, may place significant pressure on local infrastructure, services and residents. These dynamics are placing greater attention on how tourism's benefits and costs are shared, and its overall value for host communities. This chapter examines the socio-economic impacts of tourism and highlights policy approaches to maximise local benefits while mitigating adverse impacts. It explores key challenges and trade-offs in managing tourism development and visitor flows, and considers how policies can strengthen local value creation, community engagement and evidence-based decision-making to support more balanced tourism. Key policy considerations are identified to more broadly share the benefits of tourism.

Tourism is an important driver of economic growth and prosperity; it is also an important social phenomenon, involving the movement of people across different countries and cultures. Tourism spurs job creation and fosters innovation, as local entrepreneurs and businesses seize new opportunities to meet the needs of tourists, contributing to vibrant local economies and enhancing community services. Tourism also fosters social interactions, cultural exchange, and a sense of interconnectedness among people worldwide (OECD, 2024[1]). This makes tourism well placed to foster economic development that enhances well-being and social cohesion and contributes to making places more vibrant and liveable.

However, while tourism brings benefits, it can also adversely impact the people and places tourists visit when not well managed. In recent years, issues such as overcrowding, infrastructure strain and stress on local communities have become pressing topics across many destinations. Tourism can disrupt community structures and local economies, driving up living costs for residents and fuelling gentrification in certain destinations. This can displace long-term residents, overwhelm local infrastructure, exacerbate environmental degradation, and heighten social tensions, ultimately undermining community cohesion and sustainability. Working conditions and informality in some countries also remain key areas of attention.

The impacts from tourism, positive and negative, are often unbalanced, leading policymakers and local communities to increasingly question the value-added and social licence for tourism. Existing models of tourism development often mean the impacts of tourism are unevenly shared by tourists, businesses, destinations and local communities, with some destinations receiving visitor volumes that can place considerable strain on local communities, while others seek more visitor spending to support their local economy (OECD, 2024[2]). This has led to growing calls for more proactive policies and action to better manage tourism development, across all levels of government, as well as a stronger voice for local communities.

This chapter seeks to improve the understanding of the positive and negative socio-economic impacts of tourism and share policy approaches to better manage the complex interactions involved for more balanced tourism development, drawing on survey responses from OECD and partner countries. It builds on previous work of the OECD Tourism Committee that highlights the need to rebalance the impacts, understand the trade-offs and manage tourism sustainably, so the benefits outweigh the costs in emerging and established destinations (OECD, 2024[2]; OECD, 2021[3]; OECD, 2021[4]; OECD, 2024[1]). It also responds to the evolving socio-economic tensions linked with tourism development, and the need for greater policy focus on the social impacts and implications of tourism for local communities (OECD, 2024[1]).

Understanding the social impacts of tourism

Consideration of the social impacts of tourism is not new. Studies highlighting how local attitudes towards tourists can deteriorate as negative impacts emerge can be traced back to the 1960s and 1970s (for example Doxey's Irritation Index Model (1975) and the concept of "the tourist gaze" (Urry, 1992[5])). This coincides with rapid expansion and democratisation of tourism since the 1950s, linked with economic prosperity and increased disposable income and leisure time, and the expansion of commercial aviation and infrastructure facilitating people flows as part of a globalised economy. This growth has continued, interrupted only temporarily by the global financial crisis and, more significantly, the COVID-19 pandemic.

Work by international organisations has focused on this topic since the 1990s. The Manila Declaration on World Tourism underlined a commitment to involve communities in the planning, implementation, monitoring and evaluation processes of tourism policies (UN Tourism, 1997[6]). Tourism is recognised as a force for socio-economic development and poverty reduction (ILO, 2019[7]), and a healthy social and natural environment is seen as key for a thriving tourism sector (UNESCO, 2002[8]). More recently, OECD work has highlighted the importance of supporting balanced tourism and building the social license to support sustainable tourism development (OECD, 2024[2]; OECD, 2025[9]; OECD, 2021[4])

Balancing the socio-economic impacts of tourism is an increasing area of focus for policymakers at the highest levels. The G20 Rome Guidelines for the Future of Tourism endorsed by G20 Tourism Ministers under Italy's 2021 G20 Presidency include a policy focus on widening community engagement and benefits from tourism (OECD, 2021[3]), while the 2025 South African G20 Presidency highlighted the importance of community-centred models to help share the benefits of tourism. Optimising the socio-economic impacts of tourism was a key area of focus for Italy's 2024 G7 Presidency (OECD, 2024[1]). Meanwhile, the 2023 Palma Declaration by EU Tourism Ministers focuses on advancing social sustainability of tourism, including a model that benefits local populations, and promotes balanced tourism and opportunities for all.

Work by the private sector has highlighted the importance of tourism as an accelerator for social progress (WTTC, 2021[10]), noting the importance of maintaining positive relationships with residents to preserve the local character and maintain tourism's social licence to operate (World Economic Forum, 2025[11]), and calling for more advanced systems to manage and balance tourism impacts (The Travel Foundation, 2019[12]).

Understanding the significant social impacts of tourism is important to foster tourism that brings economic and social prosperity. This includes better understanding how tourism generates value for destinations, and how to manage the trade-offs involved, to take advantage of the potential for the sector to promote economic development and well-being in traditional and emerging destinations, and to create a sector where the benefits (and costs) of tourism are more widely and evenly shared.

Tourism when well managed can bring a wide range of socio-economic benefits

Tourism presents an important opportunity to help revitalise and diversify local economies, in rural, remote and urban areas. Developing tourism as part of a diversified local economy can improve the resilience of destinations and local communities, while at the same time improving the experiences of visitors and the well-being of local residents. Rural areas generally have fewer economic opportunities and less access to basic services, infrastructure and connectivity compared to urban areas. Tourism brings opportunities to provide greater motivation for people to stay in or even migrate to rural areas, as well as improving the local economy, social well-being, and the promotion and conservation of rural heritage (UN Tourism, 2023[13]). In shrinking regions, tourism can be a tool to stimulate economic activity, create new job opportunities, generate income, and diversify revenue streams to support the provision of public services and infrastructure (OECD, 2025[14]).

Tourism can contribute to improving public amenities that benefit both residents and visitors by supporting investment in infrastructure and services, such as public transport, roads and healthcare provision. Such investments can provide people with greater economic opportunities, while at the same time improving security, productivity and quality of services (UN Tourism, 2023[13]). The sector can also act as a catalyst for infrastructure development in rural and remote regions, thereby strengthening local resilience.

Beyond its economic footprint, tourism can contribute to wider societal goals by promoting well-being, building connections and acceptance between people and cultures, supporting economic diplomacy and peace building (OECD, 2024[1]). It can also foster community development and encourage the safeguarding of cultural and natural heritage. These goals are becoming increasingly important in tourism strategies and development plans. In countries like Australia and Canada, Indigenous tourism initiatives offer pathways for cultural revitalisation and supporting vibrant Indigenous opportunities. This includes targeted support for rural and Indigenous communities, strategic planning to manage visitor flows, and policies that ensure tourism revenues are reinvested locally.

Challenges need to be addressed to support balanced tourism

In addition to the wide range of benefits, tourism also brings its own set of socio-economic challenges. Tourism can give rise to tensions if the expectations and needs of tourists and locals come into conflict.

Emerging destinations can struggle to attract tourists and the socio-economic benefits they bring. Addressing these socio-economic challenges is important to support tourism development and create destinations that are attractive and liveable for residents and tourists alike.

An important issue is making sure the revenues and value generated by tourism benefit local businesses and communities. The complex nature of tourism, which is composed of many different sub-sectors and value chains, makes this process challenging. While some degree of revenue outflow from the destination where the tourism activity takes place is inevitable, the extent of this leakage can limit the positive impact of tourism for local communities, including its contribution to economic development and investment in infrastructure and services. This may be exacerbated if revenues are concentrated among a small number of large companies. This raises questions about how to encourage local sourcing of goods and services, and how to support the participation of small and medium-sized enterprises (SMEs) in local and global tourism value chains. However, detailed analysis on tourism leakage is limited, making the scale of this challenge difficult to quantify. OECD work found that on average 89% of non-resident tourism expenditure results in domestic value-added, while 11% ends as foreign value-added[1] (OECD, 2019[15]).

Visitor flows can put significant pressure on natural resources like water and land, and increase waste accumulation, pollution, and soil erosion. UN Environment has highlighted the importance of sustainable tourism development given the sector's increased consumption of key resources (UN Environment, 2018[16]). For example, estimates from the European Commission's Joint Research Centre suggest that a tourist in Europe consumes approximately twice as much water per day compared to a European resident (European Commission, 2013[17]). In natural areas, overcrowding can strain local ecosystems and degrade environmental quality, leading to long-term damage to biodiversity and the loss of pristine habitats. High spatial and temporal concentration of tourism activities can exacerbate these impacts, putting fragile cultural and natural sites under stress (OECD, 2025[9]). Ultimately, such degradation can diminish the very assets that attract visitors, undermining the long-term sustainability and competitiveness of destinations.

A specific challenge in some destinations relates to same-day visitors. Compared to overnight tourists, same-day visitors typically spend less per trip and tend to concentrate in specific hotspots for short periods, increasing pressures without injecting proportional economic benefits. Similarly, cruise tourism can put high pressures on popular destinations if not effectively managed, discharging many passengers at a single point in time, often with limited time in the destination.

Emerging destinations seeking to realise the benefits of tourism can face challenges to develop adequate infrastructure and skills. Transport links, accommodation, utilities, and other visitor facilities are all important to attract and accommodate visitors. The absence of robust infrastructure can hinder the delivery of quality experiences for visitors, reduce destination competitiveness, and place strain on existing resources that may not be equipped to handle (increased) demand.

In some destinations experiencing tourism pressures, there is growing pushback from local residents. Several European destinations in particular have seen anti-tourism protests in recent years, especially during the summer months. In some cases, residents are taking unconventional measures to regain control over the local environment. For example, in Zandvoort in the Netherlands, residents reportedly falsely marked streets as closed on Google Maps to discourage tourists driving through the local area during busy periods and prompting the navigation app to redirect drivers (IamExpat Media, 2025[18]). In Hallstatt, Austria, residents blocked the main tunnel road leading into the town in 2023 in response to high visitor numbers (NBC News, 2023[19]). In Nice, France, a street artist created a large-scale "tourist trap" installation to highlight the issue of overcrowding (Franceinfo, 2023[20]). While such actions reflect rising tensions, they may also have unintended consequences such as simply shifting the congestion to other areas rather than addressing underlying pressures.

A key flashpoint in some destinations stems from the expansion of short-term tourism accommodation. The rise of online accommodation booking platforms and short-term rentals has, in some destinations, contributed to greater housing demand. This has sometimes led to situations where residents, including those working in the tourism sector and seasonal workers, struggle to secure affordable local housing (OECD, 2024[2]). This comes at a time when real house purchase and rental prices have risen faster than inflation and incomes in recent decades, disproportionately affecting poorer and younger households (OECD, 2022[21]). At the same time, short-term rentals have led to a blurring of the boundaries between the public and tourism sphere and the private residential sphere in destinations, fostering tensions as these domains compete for limited space and resources.

Box 3.1. Evidence of the impact of short-term tourism rentals on housing – selected examples

Ireland: A study by the Economic and Social Research Institute in Ireland using data from 2023 provided by InsideAirbnb, combined with 2016 Irish census data, investigated the size of Airbnb markets relative to the private rental sector in local areas across the country. Key findings included:

- There is a correlation between current Airbnb listings and previously recorded holiday homes in the 2016 census, while there is no correlation between increases in Airbnb activity and falls in new tenancies in the private rental sector at the local level. It therefore cannot be assumed that, in the absence of Airbnb and other short-term rental platforms, such properties would become available on the private rental market.
- The issues faced in urban areas, with large rental markets, are likely to be different to those in coastal towns with more moderate rental sectors.

A simple price comparison highlights the attractiveness of short-term rentals for owners. On average, properties in coastal areas only need to be let for 6-8 days per month to match the revenue from a month on the private rental market. In Dublin City, this number is 8-10 days per month (The Economic and Social Research Institute, 2025[22]).

European Union: Work by the European Commission's Joint Research Centre uses municipal data to examine the place-based factors correlated with house prices in the EU. Key findings include:

- Factors associated with higher house prices include household growth, household income, proximity to coastline, restrictions in supply and a higher share of short-term rentals. The correlation between short-term rentals and house prices is higher in cities than in rural areas.
- Short-term rentals make up 1.2% of the EU's overall housing stock. Coastal and rural tourism destinations and specific neighbourhoods of some EU cities can see substantially higher shares of short-term rentals.
- For every entire short-term rental property listing recorded, there were 15 unoccupied dwellings i.e. vacant dwellings and those used occasionally or seasonally. About 0.7% of EU's population live in municipalities where short-term rentals account for at least 10% of dwellings, whereas nearly 63% of the population live in municipalities where at least 10% of the dwellings are unoccupied.
- Household growth outpaced population growth from 2011 to 2021 due to smaller household sizes: the EU's population grew by 2.5% in cities and fell by 2% in rural areas, while the number of households in these locations increased by 9.5% and 10% respectively (European Commission, 2025[23]; European Commission, 2025[24]).

Available evidence on the impact of short-term tourism rentals on the housing market is mixed, and knowledge gaps remain (Box 3.1). While it is likely that short-term tourism rental activity exacerbates existing pressures, the extent to which it is a main driver of observed housing issues in destinations is not clear. The key uncertainties are:

- Establishing causality: It is difficult to establish cause-and-effect on the impact of short-term rentals on housing affordability for residents. Evidence from the European Commission's Joint Research Centre suggests a positive correlation between the share of short-term rentals and advertised selling price in EU municipalities (European Commission, 2025[23]). However, even when correlation between housing affordability and short-term rentals is found, potential explanations vary. Increased demand by tourists for short-term rentals may push up the prices, or alternatively it could be that more attractive and expensive neighbourhoods attract more tourists.
- Interchangeability of housing supply: The extent to which properties are interchangeable between the short-term and long-term private rental sectors is also unclear. Evidence from Ireland shows no correlation between new tenancy commencements and Airbnb activity, finding instead a strong correlation between current Airbnb listings and previously recorded holiday homes in non-urban areas. This suggests that even without platforms such as Airbnb, many short-term rental properties would not be found in the long-term private rental sector (The Economic and Social Research Institute, 2025[22]). As such, restrictions on short-term rentals may not necessarily increase the housing supply for residents.

Managing the trade-offs to optimise the impacts of tourism

While tourism can be a significant economic and social driver, it is important to find the appropriate balance. An over-reliance on tourism as a driver of economic development and job creation can compromise economic resilience and sustainability. This can be a particular challenge in rural, remote and small island destinations with limited alternative economic development opportunities. A diversified local economy can, in contrast, complement tourism revenues during economic fluctuations and can also play a role in mitigating the impacts of seasonality and spatial concentration (OECD, 2025[9]). Similarly, underutilising the full potential of tourism can result in lost revenues and a lower investment in infrastructure and services for local communities.

Realising the potential socio-economic benefits of tourism involves managing the direct and indirect impacts at the host community level and through the tourism value chain. These impacts are linked with the complex and interconnected nature of the sector and make it challenging to deliver better outcomes for destinations, even where local communities recognise the potential contributions the sector can make to economic growth and development. The challenge is how to manage these complex interactions and balance the trade-offs to optimise the socio-economic benefits while minimising the negative and unintended impacts.

Destinations must consider several trade-offs in tourism development, including:

- Type of tourism: promoting tourism with a mass appeal which tends towards high visitor volumes versus targeting niche tourism which emphasises higher quality experiences.
- Seasonality: promoting year-round tourism, which may relieve pressure during peak periods versus concentrating activity in short, high demand periods followed by low pressure periods.
- Distribution: concentrating tourism in popular areas, which can lead to overcrowding, versus distributing tourism across the territory, which spreads the benefits but also pressures.
- Supply capacity: expanding tourism infrastructure (for example hotels and short-term rentals) to accommodate growth versus restricting development to stay within sustainable limits.
- Pricing strategy: enhancing product quality through investments in sustainability versus maintaining price competitiveness to attract cost-conscious visitors.
- Demand management: investing in marketing to attract visitors and foster a welcoming culture versus adopting measures to limit growth and protect local culture and the environment.

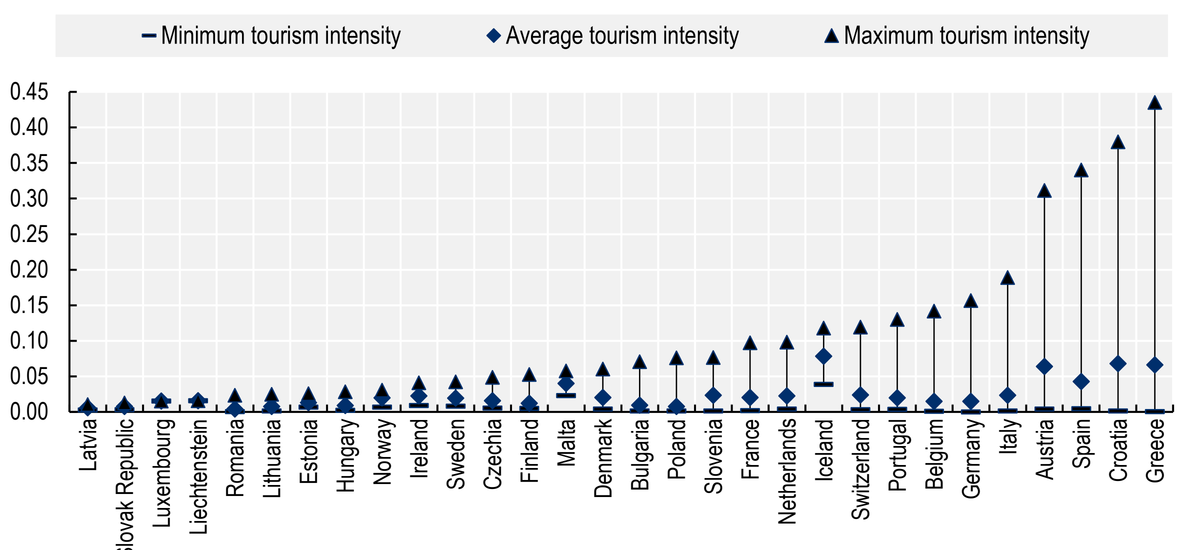
- Sentiment management: promoting the benefits of tourism to improve public sentiment and image of tourism versus implementing restrictive measures to curb tourism development.

Many of the socio-economic impacts of tourism are highly localised, and context-specific considerations are important to balance these impacts. The same number of visitors can have very different impacts depending on the way they behave, when and where they arrive, as well as the nature of the destination and tourism offer, the availability of supporting local infrastructure, and the destination management capacity, resources and governance structures (OECD, 2024[2]). An influx of visitors can lead to significant pressures on fragile environments and heritage sites if concentrated in limited areas or specific seasons, while the same number dispersed more strategically may foster community resilience, economic vitality and sustainable development.

Urban centres are likely to have better infrastructure and resources to cater to and capture the value from visitors, while remote, rural areas may lack the capacity and resources to provide adequate supporting infrastructure and attract and retain workers. Established destinations are more likely to benefit from existing infrastructure and market recognition but may struggle with overcrowding, gentrification pressures, and social displacement. Emerging destinations have opportunities to learn from the experiences of established destinations but can face challenges in building basic infrastructure and market access while maintaining community control over development processes. Regional EU data on the number of tourist overnights per resident night shows that popular Mediterranean destinations such as Croatia, Greece and Spain see an especially large variation in regional tourism intensity Figure 3.1)

Figure 3.1. Tourism intensity varies significantly between regions within countries

Average, maximum and minimum regional tourist overnights per resident night in EU countries, 2024 or latest year



Note: Tourism intensity is calculated as the number of tourist overnights per resident night. Average tourism intensity at national level, as well as maximum and minimum tourism intensity level at NUTS 3 regional level in 2024 or latest year. [The EU also tracks tourism intensity through the EU Tourism Dashboard, which provides indicators at NUTS2 level for tourism density, intensity, seasonality.]
Source: OECD calculations based on Eurostat data series tour_occ_nin3 and demo_r_pjangrp3.

StatLink https://stat.link/1yugq2

Country-specific evidence on the impacts of tourism on resident sentiment is mixed. Work from Denmark and the United Kingdom suggests that people who live in areas that experience more tourism are more likely to be proud that visitors come to their destination compared to people that live in areas less impacted by tourism (VisitEngland, PublicFirst, 2025[25]), and are also more likely to say that tourism has more positive than negative consequences (VisitDenmark, 2024[26]). In Copenhagen, Denmark, data show that even in the most heavily visited central areas, residents remain supportive of continued tourism marketing of the city. Similarly, in Austria, the three federal states with the highest number of tourist nights are also the regions with the highest positive perception of tourists in the country (Statistics Austria, 2025[27]; Statistics Austria, 2025[28]). Meanwhile, in the EU research suggests that where local areas are perceived to have become more tourist-oriented, this does not appear to have strong implications on the overall sense of belonging to the neighbourhood or the perceived social cohesion (European Commission, 2025[29]). In Spain, however, residents living in destinations with higher tourism intensity are more likely to report personal negative impacts of tourism (Turespaña, 2025[30]). Such correlations are worth further exploring to investigate potential causality.

Fostering tourism that promotes economic and social prosperity

Building liveable destinations where tourism enhances local well-being requires addressing long-standing asymmetries in how tourism value is distributed across space, time, and social groups, supported by adequate tourism infrastructure and services. The optimal polices will depend on the destination and the specific challenges faced, with strong and co-ordinated tourism governance structures playing an integral role, also to capture the voices of local communities.

Strengthening tourism planning and management structures at all levels

Addressing the issues associated with unbalanced tourism development requires stronger and more co-ordinated tourism governance structures, at all levels. The OECD has long advocated for a whole-of-government approach that links tourism with related policy areas that impact and are impacted by tourism development, at national and sub-national level. This requires better integration of tourism with broader economic and regional development strategies as well as infrastructure, transport, and public service planning, to deliver better outcomes for tourists, host communities and businesses along the tourism value chain. It also involves building a stronger policy framework for tourism at all levels, supported by the capacity and resources to plan and manage destination effectively.

Promoting more balanced tourism development is a core pillar in many national tourism strategies, with a greater emphasis on the social impacts of tourism. This includes a focus on moving tourists beyond well-known destinations and spreading visits throughout the year. For example, Canada's national tourism strategy, Canada 365: Welcoming the World. Every Day., promotes sustainable and inclusive tourism through investments in rural, remote, and Indigenous tourism development, support for off-season travel, and enhanced co-ordination across federal and regional partners.

The overarching goal of Malta's National Tourism Strategy 2021–2030 is to build a stronger, more competitive, and sustainable tourism sector by 2030, with a focus on balancing economic growth, environmental preservation, and social cohesion. In the Netherlands, recent developments in its national tourism strategy, Perspective 2030, have placed increasing emphasis on social impacts and specifically the role of residents in shaping tourism policy, with a central policy question of how to enable residents to derive tangible benefits from tourism. One of the main goals of the Spanish Strategy for Tourism is to promote balanced co-existence between residents and visitors in destinations, recognising that tourism is fundamentally a human activity interconnected with local communities.

In Portugal, balanced development is one of the three overarching policy objectives in its new Tourism Strategy 2035, to be launched in 2026. This will be operationalised through initiatives on, among other things, inclusive destination management, participatory governance, and attracting and retaining talent. At the international level, the EU's Sustainable Tourism Strategy, which will also be launched in 2026, will address social sustainability challenges by promoting better balanced tourism development across territories and seasons.

Countries are increasingly adopting efforts to link tourism to related policy areas to enhance the social impacts of tourism. In Greece, the region of Western Macedonia is taking steps to connect and integrate tourism initiatives with infrastructure improvements, accessibility upgrades, and support for local entrepreneurship, to enhance the visitor experience and well-being of local communities. Recognising the importance of SMEs for domestic tourism businesses and employment, Hungary is making efforts to co-ordinate tourism policy with SME development through financing programmes, investment incentives and reducing administrative burdens. In Latvia, spatial and urban planning considerations are integrated through municipal development strategies, where tourism is tied to cultural heritage preservation, housing policies, and improvements to public spaces.

Tourism can serve as a lever for development when integrated into wider national and regional development agendas, including to combat population decline, particularly of young people in search of better job opportunities (OECD, 2025[9]). This can help support a diversified and integrated tourism economy, which is particularly important in areas where other economic development opportunities are limited. The National Strategy for Sustainable Tourism 2030 in Egypt is tied to regional development and infrastructure plans, with tourism projects embedded in governorate-level[2] budgets for roads, waste, water, and urban upgrading to deliver stronger outcomes for communities. The United Kingdom has created a portfolio of nationally supported and strategic Local Visitor Economy Partnerships, which align tourism development with regional growth priorities.

Destinations are also formulating tourism development and management plans that reflect their unique characteristics. Local action, guided by an overarching national vision for the future of tourism can also help drive momentum for change and realise the economic and social benefits tourism can bring. Central government in New Zealand has supported the development of tailored Destination Management Plans (DMPs) across all Regional Tourism Organisations. This support included the release of Destination Management Guidelines, which provide a common framework for locally led planning and implementation across diverse stakeholders. This approach enables regions to engage with their communities and stakeholders and to tailor their strategies to local conditions.

Enhancing cross-government co-ordination structures to align national, regional and local efforts is important to manage the impacts of tourism. Understanding the roles and responsibilities of different actors can help to improve the implementation of national policies and strategies at the regional or local level (OECD, 2025[9]). In Ireland, a collaborative approach is adopted to develop visitor-centric infrastructure. Destination Experience Development Plans are prepared in consultation with industry, local authorities, and communities to foster co-ownership and alignment with local priorities. The Plans are managed by the national tourism development authority, Fáilte Ireland, working with a destination working group for the implementation. In Italy, a Permanent Tourism Co-ordination Committee involving representatives from the state and regions is in place to improve communication and co-ordination, integrating both national and regional perspectives into decision making processes (OECD, 2025[31]). Meanwhile, in New Zealand, a Cross-Government-Industry Cruise Forum was established in 2025 to address challenges facing the cruise sector, following a cross-government roundtable with the cruise industry.

Collectively this is leading to a shift in tourism governance structures and the role of national tourism policymakers. Countries are increasingly relying on Destination Management Organisations (DMOs) and local authorities to support and drive initiatives to enhance the social impacts of tourism for local communities, leaving national governments to set the overall direction and priorities. This highlights the importance of clarifying the roles and responsibilities of stakeholders and strengthening the capacity of local and regional actors. Estonia engages communities primarily through destination management organisations, which in collaboration with other tourism sector stakeholders in the region plan, co-ordinate, and implement destination development and marketing activities. A national Tourism Council, chaired by the Minister responsible for tourism, provides a cross-government forum to escalate local issues from DMOs and adjust policy rapidly when needed.

Participatory approaches are increasingly being adopted to develop and implement tourism strategies and plans. Empowering local populations to have a voice by creating strong dialogue between government, the private sector and civil society bodies on the creation of liveable destinations can support more balanced outcomes, and in turn lead to greater acceptance of tourism (OECD, 2024[2]; OECD, 2024[32]). With the highly place-specific social impacts of tourism, this is generally viewed as the role of local tourism authorities rather than national policymakers (Box 3.2). Local stakeholders typically include residents, businesses, community organisations and local governments.

Box 3.2. Participatory approaches to tourism strategy development – selected country examples

Costa Rica: The Integrated Management of Tourist Destinations Programme aims to strengthen Tourism Development Centres by fostering co-operation among local stakeholders, including chambers of tourism, development associations, municipalities, and entrepreneurs. Developed with cross-departmental and inter-ministerial collaboration, the programme supports the creation of locally driven visions and strategies for sustainable tourism, identifies key success factors, and facilitates the development of strategic investment projects, with ongoing monitoring by national authorities and implementation led by local counterparts.

Colombia: In some emerging destinations, local governments, the business sector, and community organisations come together to develop mechanisms and pathways tailored to their specific social and environmental contexts. This ongoing sector-specific dialogue enriches the actions aimed at strengthening participatory processes. Effective mechanisms focus on dialogue-based initiatives and sustained support, with oversight and reinforcement from the national government, in co-ordination with international co-operation agencies.

Italy: The Dolomiti Future Lab involved the community in Paganella in a collective and intergenerational discussion that defined the lines of development for the territory, to reduce the risk of the community being distorted by excess tourism.

Ireland: Industry, local authorities and communities are consulted during the development of Destination Experience Development Plans to foster co-ownership and alignment with local priorities. Local authorities also have dedicated tourism officers who support strategic planning, stakeholder engagement, and the implementation of local tourism initiatives.

Switzerland: The direct democratic system allows local communities to propose and vote on specific regulations, both related to tourism and other policy areas. The Swiss electorate are called on approximately four times a year to vote on elections and on specific issues, with an average voter turnout of around 40%. Citizens are also able to propose votes on specific issues themselves (Presence Switzerland, 2023[33]).

Challenges remain to give local communities a voice. Involving local stakeholders and communities in decision making requires sufficient resourcing and efforts to maintain engagement over time. Some important policy decisions and initiatives may be unpopular among residents, especially if they involve sacrificing short-term economic efficiency for long-term social sustainability. At the same time, residents can lack the time or willingness to participate. For example, in a recent survey in Denmark, only 19% of respondents indicated that they would like to be more involved in decisions regarding tourism in their local area. The respondents who were most interested in being more involved were to a larger extent those who think tourism causes issues throughout or during parts of the year (VisitDenmark, 2024[26]). Continued support for capacity-building and participatory governance structures is needed to help community voices be part of tourism planning.

The focus on balancing tourism flows has brought a renewed emphasis on the concept of carrying capacity, particularly in destinations experiencing tourism pressures. While there is no universally agreed approach or methodology for determining the carrying capacity of tourism destinations, efforts to do so can help better understand and anticipate destination capacities, determine critical thresholds, and balance trade-offs to achieve more sustainable outcomes. Importantly, carrying capacity is not a single number, but a framework to support balanced tourism development. As such, the carrying capacity of a destination extends beyond its physical structures to encompass transportation networks, public services, and environmental assets that collectively define the quality of life in a destination. Croatia's Tourism Act mandates that all tourist boards determine the carrying capacity for their destination and develop tailored Destination Management Plans. The aim is to help local authorities balance the economic benefits of tourism with environmental protection and community well-being. In Finland, Helsinki assessed the social and environmental carrying capacity of the city and found they were not under pressure from tourism (City of Helsinki, 2024[34]).

Managing visitor flows to balance the impacts of tourism

Better managing tourism flows is a key pillar of many national tourism strategies and destination management plans. Targeted measures aim to make use of the benefits of tourism, relieve tourism pressures in specific hotspots and improve the well-being of local residents, while also improving the visitor experience. This includes efforts to manage demand and visitor flows within destinations, diversify the tourism economy, encourage appropriate tourism development in new and emerging destinations, and use regulatory tools to limit tourism activities.

Countries and destinations are increasingly looking to diversify the tourism economy. Offering tailored experiences based on a destination's unique assets and identity can help destinations stand out from competitors and cater to changing traveller demand and behaviour (OECD, 2025[9]). Many destinations have strong tourism potential linked to heritage, gastronomy, landscapes, and outdoor recreation as tourists increasingly seek meaningful interactions, slower travel, and lower-impact choices. Countries are looking into various tourism niches including cultural, educational, health, wellness, slow and agritourism, as well as meetings, incentives, conferences, and exhibitions (MICE), and sports and cultural events.

At the national level, many countries are taking steps to spread tourists spatially and temporally. This includes efforts to encourage tourists to visit during off-peak periods and to new and emerging destinations. For example, Destination Canada's Tourism Corridor Strategy Program supports travel to lesser-known regions by developing interconnected tourism routes that highlight local attractions, cultural experiences, and natural assets, supporting also infrastructure development for access to remote or less developed areas (Box 3.3).

In Greece, the "Tourism for All" programme provides financial subsidies in the form of digital vouchers to eligible Greek residents to subsidise the cost of accommodation. The aim is to stimulate off-season domestic travel, promote lesser-known destinations, and strengthen local economies, while contributing to social inclusion and supporting accessible and affordable domestic travel. Through the programme Travel Better, Switzerland promotes off-peak travel, visits to lesser-known destinations and longer stays to alleviate pressures and spread the benefits of tourism. Campaigns highlight regional specialties, cultural events, and outdoor activities like hiking and biking in less crowded areas. Meanwhile, Egypt has redesigned its promotion plans and incentive schemes to support year-round tourism and re-distribute tourism flows to less-visited rural destinations.

Box 3.3. Tourism Corridor Strategy Program in Canada

To manage tourism demand and alleviate pressure on high-traffic destinations, Destination Canada has introduced the Tourism Corridor Strategy Program. It is designed to encourage travel to lesser-known regions by developing interconnected tourism routes that highlight local attractions, cultural experiences, and natural assets. By promoting regional collaboration among municipalities, Indigenous communities, and tourism operators, the strategy helps build cohesive destination networks that can accommodate visitors more sustainably.

These corridor strategies also support infrastructure development, such as transportation links, signage, and visitor amenities, which are essential for enabling access to remote or less developed areas. Importantly, they aim to diversify tourism flows, reducing the environmental and social strain on popular destinations like Banff, Niagara Falls, and Vancouver, while stimulating economic activity in lesser-visited regions. This approach not only spreads the benefits of tourism more evenly but also fosters community resilience and cultural preservation. By integrating corridor planning into broader tourism and regional development strategies, Canada is working to ensure that tourism growth aligns with sustainability, equity, and long-term economic goals.

Destination Canada provides strategic planning, data analysis, and investment attraction support, such that corridor development aligns with community priorities and national tourism objectives. This model fosters integrated planning across transport, infrastructure, and land use, helping communities manage visitor flows and build capacity for long-term growth. The Tourism Corridor Strategy Program also provides opportunities for businesses to collaborate with governments and local communities.

At destination level where the impacts of tourism are most felt, similar efforts are also underway. In Dubrovnik, Croatia, for example, a maximum limit of two cruise ships at any one time helps manage tourism flows as part of the "Respect the City" initiative (Box 3.4). To spread guests away from popular places, the Faroe Islands, Denmark, have introduced Self-Navigating Car rentals, offering mystery routes around the islands. By removing the choice of where to go, the initiative encourages visitors to discover new sights beyond the handful of well-known waterfalls and trails (BBC, 2025[35]). In Berlin, Germany, tourism marketing involves all the city's twelve districts, covering issues from strategic exchange to inclusion in marketing, thereby utilising the potential of the districts and their specific attractions. Several local governments in Poland have adopted local parking policies in areas experiencing high tourist pressure, particularly tourist and spa towns such as Wrocław and Toruń. Additionally, as part of transport strategies, parking zones with preference for local residents, Park & Ride car parks and short-term parking spaces for coaches are designated in areas with the greatest tourist attractions to alleviate tourism pressures.

Measures to spatially spread tourists must be carefully managed to ensure that less-visited areas are adequately prepared, with the capacity and infrastructure to accommodate and manage the rise in visitor numbers**.** Without adequate preparation, dispersing visitor flows risks spreading or displacing the challenges associated with unbalanced tourism to other areas, and potentially locking these areas into low-value, high-volume activity. This includes building the necessary hard infrastructure such as transport links and municipal services, as well as the capacity and skills to develop and deliver quality tourism services and experiences (OECD, 2025[9]). In certain emerging destinations in Colombia, local governments, businesses, and community organisations are working together to develop mechanisms and pathways tailored to their specific social and environmental contexts, with a focus on dialogue-based initiatives and sustained support. The national government provides oversight and support, in co-ordination with international co-operation agencies.

Box 3.4. Respect the City initiative in Dubrovnik, Croatia

Through the "Respect the City" initiative, Dubrovnik is implementing measures such as temporary limitations on the number of tourists at key sites, as part of broader efforts to manage visitor flows and preserve the quality of life for residents. These measures are also reflected in Dubrovnik's Smart City Strategy, highlighting a holistic approach to sustainable urban and tourism management.

In 2017, Dubrovnik faced significant challenges due to uncontrolled tourism development. The historic city centre attracted millions of tourists annually, including many cruise ship visitors, which lead to overcrowding and negative impacts on both the local community and the visitor experience. In response, the city launched the "Respect the City" initiative to promote sustainable tourism and improve the quality of life for residents and visitors. The main solutions implemented include:

- **Cruise ship management**: the city has partnered with the Cruise Lines International Association to reorganise cruise schedules and stagger departures and arrival times, setting a maximum limit of two cruise ships at any one time, to reduce the impact on local residents and improve tourism flows.
- **Infrastructure adjustments**: measures included reducing the number of souvenir stands by 80% and cutting the number of restaurant tables and chairs by 30%. The first Croatian Special Traffic Zone around the UNESCO World Heritage Site core area, together with the Pobrežje Park & Ride System, help relieve traffic congestion and promote sustainable mobility.
- **Smart City tools**: this includes the Dubrovnik Pass, visitor counting, crowd prediction and a bus planning tool (Bus Webshop) to protect heritage, fund cultural institutions, and disperse and manage visitor flows.

Demand management measures are increasingly focusing on identifying critical thresholds and limits to manage visitor flows. Targeted, data-driven restrictions, combined with transparent communication of alternative mobility and itineraries, have the potential to protect resident quality of life without undermining the visitor experiences. The most common measures are pre-booking systems to access individual attractions, such as those operating in the Calanques in France, Mount Fuji in Japan, Gaudi's Park Güell in Barcelona, Spain, and Glacier National Park in Montana, United States. Some destinations are also expanding the opening hours of museums, heritage sites and parks to spread visitor flows. For example, Türkiye has introduced a night-time museum initiative to reduce spatial concentration at specific sites and increase access to cultural experiences.

There is no one-size fits all solution, and in some places there may be a strong argument to concentrate tourism in specific locations, where adequate tourism infrastructure can be provided, and to limit the spillover of negative impacts on local communities. Such an approach has been adopted by the city of Bruges in Belgium, which since the 1980s has concentrated tourism in a small area of 4.4 km^2 in the city (European Commission, 2024[36]). Mexico, meanwhile, has a long-standing model of integrated tourism planning and development, with planned tourism destinations like Cancún serving as the backbone of the tourism economy. In more recent years Mexico has looked to leverage this expertise through new community-based models of tourism development. The city of Benidorm in Spain was designed and purpose-built to handle large numbers of visitors. Benidorm's infrastructure accommodates tourists without displacing residents, something which is recognised in the destination receiving the 2025 EU Green Pioneer of Smart Tourism award. However, this approach may also limit the spillover of the positive impacts and limit the ability of host communities to capture the economic value generated by tourism.

Measures to manage visitor flows and balance the impacts of tourists must be carefully considered to avoid unintended consequences. In some destinations that rely on tourism, there can be an acceptance of tourism during the peak season in the knowledge that locals can earn enough to live and reclaim their community during off peak periods. However, this approach may heighten negative effects during the peak season, such as congestion, rising prices, and diminished well-being for residents, if not properly managed. Conversely, spreading travel throughout the year has the potential to support services, stabilise jobs, and reduce the risk of overcrowding during peak seasons, but also with the risk of spreading environmental and social pressures to previously unaffected periods. Similarly, while limiting visitor flows can relieve pressures on infrastructure it can also have economic consequences such as fewer job opportunities. Finally, digital nomadism and remote work are creating new semi-permanent visitor profiles that require a rethinking of housing, digital infrastructure, and community integration strategies.

Digital tools, including artificial intelligence (AI), have the potential to play an important role in managing tourism flows. Mobile applications providing real-time information on crowd levels and queue times can facilitate the redirection of visitors to less congested sites, while targeted incentives can encourage guests to explore a broad variety of locations, including those that are underfunded or less well-known. By efficiently managing tourist flows through predictive analytics and personalised recommendations, AI can contribute to reducing overcrowding at popular sites, also reducing environmental strain. However, AI recommendation systems, if not properly managed, have the potential to exacerbate issues associated with overcrowding at popular destinations (OECD, 2024[37]). Concrete examples of AI tools used to proactively manage tourism flows are still lacking or under development.

Building supportive infrastructure and services for tourism flows

Tourism depends on and is shaped by the infrastructure and services available in destinations. The provision of tourism-specific infrastructure and services providing accommodation, dining, entertainment and attractions is largely the responsibility of the private sector, operating according to local rules and regulations. The sector also relies heavily on public infrastructure and services. This includes network infrastructure, such as transport and basic water, waste, energy, communications, public order and health services, as well as the infrastructure that makes natural and cultural resources and other public goods accessible to visitors (for example bike trails, visitor centres). Quality tourism services also depend on supporting and facilitating infrastructure, such as digital communication networks and information technology systems.

Given this, the development and associated impacts of tourism are closely linked with public infrastructure, resources and services, and the wider policy and regulatory environment within which tourism businesses operate. Effective collaboration between public authorities and the private sector is therefore essential to ensure that both tourism-specific and general infrastructure can accommodate visitor flows while meeting the needs of local residents. Tourism in turn can generate revenue for local and national governments through taxes, fees and other levies, which can support maintenance and upgrades of infrastructure and services to the benefit of all.

Tourism development decisions need to consider the implications for, and be better integrated into, public infrastructure and service planning and delivery to relieve infrastructure strain in destinations experiencing pressures and develop the necessary infrastructure in new and emerging destinations. Destinations can see a trade-off between expanding infrastructure and restricting development. Expanding tourism infrastructure can stimulate local economies and create jobs, while at the same time supporting a greater influx of tourists, providing immediate economic benefits and fostering growth in sectors like hospitality and retail. However, unchecked expansion risks placing excessive pressure on local resources, public utilities, and the environment, potentially leading to congestion, rising living costs, and diminished quality of life for residents. At the same time, oversupply risks creating under-used capacity. Restricting development can help safeguard community well-being and preserve environmental and cultural assets but may instead add strain to existing infrastructure, limit economic opportunities and reduce competitiveness if demand outpaces capacity.

Chile's Infrastructure and Tourism Use Plan in Protected Areas 2024–2028 contains short and medium-term planning for public investment in infrastructure projects for 18 protected areas in nine regions, as well as the implementation of sustainable sanitary services in 52 protected areas nationwide. The aim is that the infrastructure can promote economic development of local communities while at the same time preserving the territories' natural and cultural heritage. To reduce regional disparities, Slovakia is supporting tourism development in under-visited and rural areas through targeted grant schemes and infrastructure investments. Funding is focused on developing cultural, nature-based, and wellness tourism products that attract visitors beyond traditional destinations and peak seasons.

In Latvia, co-operation between the Ministry of Economics which is responsible for tourism and the Ministry of Transport has led to improvements in regional accessibility through investments in rail and cycling routes, such as the Green Railways initiative, which simultaneously supports tourism, sustainable mobility, and regional development. Ahead of the 2026 World Cup, the United States prioritised transport and infrastructure to support seamless travel to and around the country. In response to the unique needs of people with a disability, including tourists, the Accessible Australia Program funds the building of accessible toilet facilities, portable equipment for inclusive beaches, portable amenities for inclusive national parks and fixed inclusive play spaces that improve community spaces for both residents and visitors. Countries are also noting the need for data on, for example, tourism water consumption and waste production to better understand tourism impacts on infrastructure, to support its management.

Information sharing and better understanding of visitor flows, needs and behaviours can help support the provision of well managed infrastructure and services that cater to both residents and tourists. High seasonality presents specific challenges for infrastructure planning, as facilities and services need to be capable of accommodating peak periods without resulting in underutilisation during off-peak times. Strategic investments in adaptable and scalable infrastructure, such as transport systems and public amenities, can help alleviate pressures throughout the year.

The financing of adequate infrastructure and services is a challenge, particularly in the context of fiscal constraints and in rural and remote locations. The Ministry of Regional Development in Czechia has introduced the national subsidy programme Tourism Revitalization Through Support for Tourism Infrastructure to fund local infrastructure, including trails, rest areas, signage and small visitor facilities, aimed at improving access to peripheral or rural destinations and extending the tourism season. Israel has launched the Accessibility Budgeting Procedures for Tourist Sites 2024-2025 initiative, which allocates ILS 20 million to upgrade accessible paths, signage and facilities to improve access for a wider group of travellers. The Rural Tourism Infrastructure Fund in Scotland, United Kingdom provides funding to support local infrastructure improvements and mitigate negative community impacts in rural areas experiencing increased visitor pressure. The funding is focused on developing infrastructure to improve visitor management, such as low-carbon transport, multiuse paths, toilets and motorhome facilities, and visitor information signage (Visit Scotland, 2025[38]).

How tourists and the tourism sector contribute to financing the infrastructure and services used by tourists is receiving increased attention. In many countries, so-called 'tourism taxes' have been implemented or are being considered, sometimes at the national level but more often at the destination level. The aim is to supplement existing tax revenues from tourism, for example from VAT, and help counter the so-called 'hidden' costs of tourism on communities and the environment, similar to the polluter pays principle (OECD, 2008[39]). In New Zealand, international visitors contribute directly through the International Visitor Conservation and Tourism Levy, which funds projects such as conservation activities, visitor infrastructure and other tourism initiatives. In Norway, a national law allows municipalities with high tourism pressure to introduce a local tourist tax of up to 3% on commercial accommodation, including hotels and cabins, with the potential to expand to cruise tourists. It is worth noting that tourism taxes are not a one-size fits all solution. In Denmark, a proposed tax on overnight stays failed to get parliamentary support, with the high administrative costs associated with managing the tax collection and allocating the revenue highlighted as a key argument against its introduction.

In most cases, the taxes aim to generate revenues to provide the supporting infrastructure and services for tourism. The earmarking of revenues raised through tourism-related taxes to provide infrastructure and other facilities to address the sector's unique challenges may help secure buy-in and acceptance by visitors, tourism businesses and local communities. Similarly, clear communication regarding how funds are being used for tangible improvements, such as infrastructure upgrades, environmental conservation, and cultural preservation can reinforce the legitimacy and acceptance of such tourism taxes. However, this needs to be weighed against the potential drawbacks, particularly the constraints that earmarking can place on fiscal flexibility (OECD, 2019[40]).

In some cases, the taxes also seek to modify tourist behaviours. For example, Hungary has quadrupled the accommodation tax on short-term rentals in Budapest with the aim of addressing housing issues, while it remains unchanged in the rest of the country. This is in addition to introducing a two-year moratorium on new short-term rental licences between January 2025 and December 2026. Meanwhile, investment in new hotels continues, supported by development programmes, with several large-capacity hotels opening in Budapest in 2025. However, more evidence is needed on the effectiveness of tourism taxes in changing behaviours and limiting visitor numbers. There is some evidence to suggest that the impacts of tourism taxes on demand tend to be marginal, and that it is difficult to isolate the impact of taxes from other factors impacting tourism demand (Group NAO, 2020[41]). Similarly, evidence from the introduction of a tourist tax in Manchester, United Kingdom indicates that the tax had no significant effect on hotel performance (Anguera-Torrell, Aznar-Alarcón and Boto-García, 2025[42]).

Promoting business models and practices that capture the value of tourism locally

The private sector has an important role to play in optimising the socio-economic benefits of tourism and aligning business practices with wider sustainability goals. Existing models of tourism development often result in the impacts of tourism not being evenly shared by tourists, businesses, destinations and local communities and, as a result, countries are increasingly looking to strengthen locally owned tourism businesses and tourism value chains. The private sector also has an important role in providing quality working conditions and upskilling opportunities within the tourism sector.

SMEs have a particularly important role to play as the predominant form of business and employment within tourism and represent an opportunity for local communities to access the economic impacts of tourism. At the same time, SMEs face unique challenges, such as less diversified economic activities and weaker financial structures compared to larger businesses (OECD, 2022[43]), with tourism SMEs facing more particular challenges, including more stringent credit conditions (OECD, 2017[44]). While digital tools can help SMEs to streamline operations and improve customer engagement and experiences, they also require new skills to undertake new tasks, including the management of data and effective digital communications, which are often out of reach (OECD, 2025[45]).

Policies that support capacity-building, access to finance, and digitalisation can strengthen the role of SMEs in tourism ecosystems and enhance sector competitiveness. Instruments such as small grants and support to access finance, adopt digital tools, innovate and access markets are being used to help local entrepreneurs to operate guesthouses, tour guiding services, crafts, and food businesses competitively, while building local capacity and helping community members benefit economically from tourism. In Canada, federal policy supports the adoption of digital tools and technologies by tourism businesses. Programmes are delivered through regional development agencies and the federal government and aim to build digital capacity, particularly among SMEs and rural operators. Meanwhile, Peru's *Turismo Emprende* programme seeks to diversify and strengthen the country's tourism offer by providing co-financing for improvement and innovation projects to micro and small businesses operating in travel, hospitality and catering services. In Portugal, business capacity-building and incubation programmes aim to help SMEs professionalise and scale operations. These programmes provide technical training, strategic tools, and encourage microenterprise aggregation into collaborative networks and clusters, particularly in low-density regions. Recent OECD work highlights the important role that incubators and accelerators can play in improving the effectiveness of entrepreneurship support (OECD, 2026, forthcoming[46]).

Co-creating products that reflect local values and identities can bring benefits to businesses and support local communities. Public-private partnerships can be used to develop infrastructure, manage visitor flows, and promote local economic benefits, allowing local areas to leverage private capital while helping to ensure that tourism investments reflect community values and sustainability principles. In Estonia, municipalities and businesses co-design year-round products and marketing through partnership-based destination management organisations, with increasing local co-financing for strengthened accountability. Supported by Visit Estonia programmes, the private sector's role is to co-create offers, share data, adopt sustainability standards, and invest in skills and digital tools. In Greece, the 2021 Law on Destination Management and Marketing Organisations and Model Tourism Destinations of Integrated Management aims to support destination management by creating a stable co-operation framework between the public and private sectors, acknowledging that unique destination characteristics may necessitate tailored planning and monitoring support (OECD, 2024[2]).

Partnerships between large operators and local businesses can help the value of tourism reach local communities, enhancing local economic resilience and building local capacity. This can both support local entrepreneurship and encourage the development of distinctive products and services that reflect the region's identity, further enriching the visitor experience. This is the aim of the Airbnb Community Fund, for example, which supports a range of organisations from national nonprofits to local community organisations to strengthen local communities (Airbnb, 2025[47]). Similarly, the TUI Futureshapers Global project provides flexible capital and mentoring to entrepreneurs and SMEs that aims to maximise tourism's positive impact on communities, employees, and the environment (TUI Care Foundation, 2025[48]).

Regional clusters can also help connect tourism services with local farmers, craftsmen, and cultural initiatives to strengthen local value chains. Formalising value chains in crafts, food and guides can support the development of local economies with tourism income being retained locally. The Gauja National Park tourism cluster in Latvia operates as a public–private partnership, where municipalities, private businesses and NGOs work together on marketing, infrastructure, and sustainability, ensuring that local voices are heard as part of the decision making process.

Locally owned tourism businesses and initiatives can be leveraged to strengthen community acceptance of tourism and highlight local cultural heritage and natural assets. This can strengthen community pride, while at the same time reducing the divide between tourists and residents by promoting shared value and mutual respect. The "Local Host" label in Croatia highlights authentic family accommodations that promote responsible tourism and help ease community pressures. To be certified, hosts need to meet quality, hospitality, and sustainability standards, offering guests a genuine local experience while supporting the preservation of local traditions and the environment. These hosts connect visitors with authentic local experiences, traditions, and businesses, helping to retain tourism income in the community and deepen visitor engagement. The Buurthotel initiative in the Netherlands is a network of hotels that create and provide services to add value to resident and neighbourhood-focused initiatives, such as free space for training, free classes and expositions.

Supporting accessible tourism businesses is an increasingly common policy priority for destinations. Implementing measures to support accessible tourism businesses, when combined with the relevant infrastructure for the needs of the target market, can help to ensure that the benefits of tourism reach local residents and improve access to a wider group of travellers, including people with disabilities, older travellers and people with reduced mobility. The WELCOME Framework in Australia provides easy-to-follow guidance for tourism businesses to make their products and services more accessible to all users. It guides tourism businesses in understanding the needs of, and promoting their business to, the accessible tourism community. Meanwhile, Greece has introduced "Accessible Tourism Destination" and "Accessible Tourism Enterprise" quality labels that introduce accessibility standards in tourism installations and destinations.

Box 3.5. Upskilling and reskilling tourism workers in Greece

In response to the evolving needs of the tourism sector, the Ministry of Tourism in Greece implemented an online training programme aimed at upskilling and reskilling both employees and unemployed individuals across the country. This programme shows how targeted education policy can contribute to the development of rural and less-visited destinations. What makes this initiative particularly effective is its online delivery model. By removing the constraints of time and place, the programme has ensured access to quality training even in remote islands, mountainous villages, and lesser-developed regions.

The curriculum included core specialties, such as reception services and culinary/pastry arts, but also focused on the development of horizontal skills, such as digital competencies, health and safety at work and English terminology, providing participants with the tools they need to work in a competitive and increasingly demanding tourism economy.

More than 40 000 applications were submitted within the first few days of its launch, exceeding initial projections. This response highlights the pressing need for accessible, flexible, and targeted upskilling and reskilling opportunities within the tourism sector, particularly among seasonal workers, unemployed individuals, and employees in remote and peripheral areas. The scale of participation reflected that continuous professional development is critical not only for individual career advancement but also for the long-term competitiveness and sustainability of tourism in Greece.

Training represents an opportunity to support sustainable and competitive growth in the tourism sector, and ensure that qualified personnel can deliver high-quality services, enhance the visitor experience, and valorise the cultural and natural heritage of destinations. The aim of the UN Tourism Best Tourism Villages initiative is to use tourism to support rural prosperity and well-being. In Egypt, this initiative has been used as an entry point for technical assistance, community enterprise support and marketing that prioritises local SMEs, women and youth. This included training for local guides, handicraft value-chain support and small grants. In Greece, a training programme focused on the development of transversal skills in the tourism sector highlighted the importance of continuous professional development (Box 3.5). Tourist guides in Italy can enhance their skills at predetermined intervals to improve the quality of the service and visitor experience, including to: specialise in certain areas such as sustainable tourism, events, territorial marketing and digital guides; learn about specific markets such as luxury, youth, religious and experiential tourism; and develop intercultural and personalised communication skills for different types of tourists. Israel is strengthening tourism education at the high school level though internships and hands-on projects with local businesses to cultivate early interest in the sector, aiming at the same time to address labour shortages.

Managing short-term rentals and other tourism activities

Tourism businesses operate within locally determined frameworks, including business licensing, consumer protection, health and safety protocols, employment standards and land-use planning. Visitors are also expected to follow local laws governing conduct, public order, and the use of infrastructure and services. Approaches to managing tourism therefore need to align with existing laws and regulations, and involve related authorities when relevant, while taking into account the wider impacts of tourism on the local economy.

In certain instances, authorities that are not directly responsible for tourism can make decisions that impact tourism. This can lead to issues for tourists and residents if such decisions are not co-ordinated or do not take account of the potential wider impacts. For example, decisions to expand harbour capacity and increase the frequency of cruise ship dockings may inadvertently exacerbate challenges, particularly in destinations experiencing tourism pressures. This concern is now widely acknowledged, and many destinations are implementing restrictions on the number and scheduling of cruise ships.

The rapid emergence and growth of short-term rentals is leading many destinations experiencing tourism pressures to look towards regulatory solutions. Such measures commonly aim to balance the economic benefits of tourism against the pressure that it can place on local communities, particularly in areas experiencing shortages in housing and tourism accommodation. Common management tools include: mandatory registration; taxes on stays; moratoriums or caps on new registrations; permits or business licenses; host residency or primary-home rules that require the host to live on the property for a minimum period; geographic zoning or exclusion of short-term rentals from saturated historic cores or sensitive ecological areas; restricted safe-key installations; and caps on the number of nights short-term rentals can be rented out.

For example, British Columbia in Canada has introduced legislation to standardise short-term rental rules across communities. In Berlin, Germany a ban on the misuse of property and compulsory registration have halved the number of Airbnb apartments. The region of South Tyrol in Italy has capped the number of overnight stays available to tourists in tourist accommodation, including hotels and short-term rentals. Municipalities have a fixed quota of overnight places, and any new accommodation needs to be approved by local councils that can only grant permission if they have more places available, for example due to a tourist accommodation closing (Forbes, 2023[49]). Meanwhile in major cities like Rome and Milan, community-based housing initiatives are on the rise, to retain affordability for locals. In Japan, in order to prevent the deterioration of the living environment in surrounding communities, short-term rental operators are required to inform guests about matters related to noise prevention and waste disposal, as well as to respond appropriately and promptly to complaints and inquiries from residents living in the vicinity.

Tourism policymakers can play an important role in managing the impacts of short-term rentals, in co-ordination with other relevant authorities. Such measures need to be carefully designed to avoid unintended consequences. Evidence from Ireland suggests that the issues faced in urban areas with large rental markets are likely to be different to those in coastal towns with more moderate rental sectors (The Economic and Social Research Institute, 2025[22]). Evidence also suggests that professional operators dominate central areas and are more adept at circumventing rules, and that multi-listings, that is multiple properties managed by one host, tend to be least affected by regulatory interventions (Bei, 2025[50]). Furthermore, limiting accommodation or short-term rentals in destinations under pressure may not necessarily address overcrowding issues, if alternative accommodation can be easily found nearby, and these displaced overnight visitors may still travel to the originally intended destination but as additional same-day visitors instead.

Establishing a detailed and comprehensive register covering short-term rental activity can help policymakers obtain the necessary evidence to balance the need for tourist accommodation with the need for housing for locals. At international level, EU Regulation 2024/1028 (European Union, 2024[51]) on how data related to short-term rentals should be collected and shared aims to improve the evidence-base on the impact of short-term rentals in the EU. Furthermore, as part of an Affordable Housing Act, the Commission will propose a new legislative initiative on short-term rentals, with the aim of enabling local authorities to address housing stress and support sustainable tourism (European Commission, 2025[52]). At national level, Italy has launched a National Accommodation Database requiring all hospitality providers and short-term rental hosts to register and obtain a National Identification Code to include in all listings and public communications, ensuring transparency and traceability of short-term rentals. Türkiye has introduced legislation that makes short-term rental activities subject to a mandatory permit license issued by the Ministry of Culture and Tourism. In several regions of Switzerland, landlords renting out short-term rentals are obliged to register as hospitality service providers.

Supporting tourism acceptance by local communities

Host community support and acceptance is important for tourism, but it is not a given (OECD, 2025[9]). If economic benefits from tourism growth are not captured locally and the impacts on the community and environment are not carefully managed, the risk of declining acceptance and support for tourism increases, which in turn can erode the social licence for tourism. A negative perception of tourism, by residents and travellers, can also potentially undermine destination appeal. At the same time, host community and place is often a key part of why tourists choose to visit a specific destination. It is therefore in the interests of the tourism sector to prioritise balanced tourism development, such that the benefits reach local businesses and communities, and tourism activity contributes to enhanced living standards and resident well-being.

Communicating the full range of tourism's impacts can play a role in improving resident sentiments towards tourism. In destinations under pressure, negative impacts such as overcrowding, rising costs, or gentrification can be more visible and tangible to residents than the positive contributions, such as improved infrastructure, cultural exchange, or enhanced economic opportunities, which are often less apparent or harder to quantify. Media coverage of anti-tourism protests together with the virality and amplifying effect of social media can further reinforce the perceptions of tourism as an issue that needs to be solved, also in emerging destinations. Actively communicating the positive impacts of tourism for local communities may foster a more balanced view of the impacts of tourism. For example, evidence from a study carried out in Saudi Arabia suggests that social media marketing can enhance residents' perceptions of their city, which in turn is more likely to generate a positive attitude towards the impacts of tourism (Alzaydi and Elsharnouby, 2023[53]). Poland's Strategy for Integrated Marketing Communication Management in Tourism until 2030 includes a focus on Appreciating Tourism, which aims to raise awareness of the importance of tourism within society.

An important question remains how destinations and countries can preserve authentic local culture while benefiting economically from tourism. The risk of gentrification of specific areas within cities is seen as an increasing issue in certain destinations experiencing tourism pressures. At the same time, emerging destinations wishing to attract visitors can see the need to pre-emptively address the risk of gentrification. Initiatives to support affordable housing, community engagement, and dispersing visitor flows are all relevant tools to help preserve authentic local culture.

Training programmes for tourism operators, guides and local entrepreneurs can also help support a balance between tourism development and the protection of local culture. Such programmes can raise awareness of the importance of valuing and safeguarding authentic cultural heritage, helping preserve the identity and distinctive character of host communities. At the same time, this can serve as a tool to promote the development of sustainable skills, providing the knowledge needed to design tourism experiences that respect the cultural and environmental specificities of the local area. Through visitor engagement programmes in Hawaii, United States, visitors learn Hawaiian history and culture, experience firsthand traditional cultural practices, and undertake related activities that convey respect and reaffirm the principle of reciprocation to the place, resources, and traditional knowledge holders (OECD, 2022[54]). Meanwhile, Egypt supports handicraft initiatives to help local communities benefit from tourism, while at the same time contributing to cultural heritage preservation and strengthening social cohesion.

The behaviour of tourists plays an important role in shaping host community experiences. Misconduct and antisocial behaviour which impact residents and tourists alike is increasingly highlighted as an issue in the media, particularly in destinations under pressure. Challenges range from loud and rowdy tourists, vandalism, irresponsible cycling, and visitors disrespecting local customs and cultures, to increases in crime and security challenges, including irregular migration and trafficking in flora, fauna, and cultural heritage.

Disrespectful behaviour by tourists is not necessarily intentional, and misunderstandings can arise from cultural differences, unfamiliar norms, or lack of awareness. Marketing campaigns are increasingly being used to encourage respectful visitor behaviour, providing targeted information to help guide and encourage desirable behaviour and educate tourists on cultural differences. In Czechia, the “Enjoy Respect Prague” campaign educates visitors about responsible behaviour, local rules and respect for residents. The CopenPay initiative in Copenhagen, Denmark, incentivises tourists and residents to adopt greener behaviours, such as colleting waste in the canals, by offering small rewards (for example a free coffee), thereby encouraging more responsible visitor conduct while also demonstrating to local communities the positive contributions that tourists can make. In Indonesia, Bali introduced a set of guidelines for visitors focused on respecting locals, temples and culture, and appropriate dress. Similarly, the “How to Amsterdam” campaign in the Netherlands highlights ten ground rules for tourists to bear in mind when visiting, based on respecting the city and its residents. In New Zealand, visitors are asked to care for land, sea and nature, travel safely and respect culture, as part of the *Tiaki* promise, a concept developed locally to help visitors travel safely and conscientiously.

Some destinations experiencing pressures are also looking to harder measures including bans and fines to encourage more respectful behaviour by tourists and locals. Barcelona in Spain has implemented a city-wide ban on organised alcohol-focused tours in response to concerns over public disorder, neighbourhood disruption, and health risks. The regulation forms part of a broader strategy to safeguard public spaces, support community well-being, and uphold responsible tourism standards across the city. In several Mediterranean countries, wearing swimwear away from the beach, drinking alcohol in public, taking a shell from the beach, or reserving a sunbed without using it now incurs fines.

The effectiveness of fines in managing the tourist behaviour depends how they are framed and administered, as well as the size of the fine. Available evidence suggests that fines administered publicly are more successful in changing behaviour than those imposed privately (Kurz, Thomas and Fonseca, 2014[55]), while higher fines impact behaviour more than the probability of being detected (Laske, Saccardo and Gneezy, 2018[56]). This suggests that visible enforcement and meaningful penalties are more likely to deter undesirable behaviour than relying solely on the threat of occasional monitoring.

Measuring social impacts of tourism for informed decision making

Measuring and monitoring the socio-economic impacts of tourism is important to help develop evidence-based policies as well as evaluate the effectiveness of policies in the tourism sector. Traditional tourism statistics have typically focused on volume metrics and the economic impacts of tourism. Attention is increasingly shifting to consider value metrics and the wider impacts of tourism. However, measuring the social impacts of tourism remains a challenge and requires careful consideration of several factors. These can vary significantly between destinations, for example, the type and characteristics of the tourism offering, the seasonal and spatial distribution of tourism, the strain on local infrastructure and services, financial resources for shared infrastructure and public spaces, local residents’ tourism acceptance, and the overall attractiveness and spatial planning of destinations.

Work at international level is helping to expand the knowledge and evidence base on the social impacts of tourism and support standardisation. The Statistical Framework for Measuring the Sustainability of Tourism (SF-MST) includes a pillar on the social dimension of tourism, from the perspective of visitors, hosts, tourism suppliers and governance (UN Tourism, 2024[57]). The UN has also developed a new indicator to more effectively monitor tourism employment, and work is underway by UN Tourism to develop an ESG framework for tourism businesses. At European level, Eurostat is developing a set of indicators measuring the sustainability of tourism based on existing data sources which includes a social pillar, while the EU Tourism Dashboard includes tourism intensity and employment data. Meanwhile, the Visitor Management Assessment and Strategy Tool (VMAST), developed by UNESCO, helps site and destination management authorities manage visitation and tourism for protection of heritage values while enhancing community sustainability and resilience.

The OECD Tourism Committee and its Working Party on Tourism Statistics is also active on this issue, with OECD and partner countries developing a proposed core set of indicators and associated metrics to measure the sustainability of tourism which including a pillar on the social impacts. This work builds on extensive consultations and inputs from OECD and partner countries, and draws on country-specific work undertaken with the support of the European Union via its Technical Support Instrument (TSI) to strengthen the evidence base for a sustainable tourism future in Greece, Malta, Portugal, Slovenia, and Spain (OECD, 2025[58]; OECD, 2025[59]; OECD, 2025[60]; OECD, 2025[61]; OECD, 2024[62]). The work is supporting the concrete implementation of the SF-MST by advancing the process of aligning indicator selection and implementation in a way that responds to country policy priorities.

Box 3.6. Measuring the socio-economic impacts of tourism – selected examples

Australia's Longitudinal Indicators for Visitor Economy includes a set of 20 key indicators to measure the health and performance of the visitor economy across the economic, social, environmental and institutional dimensions.

Canada's Wealth and Wellbeing Index aims to assess the full range of benefits that tourism brings to Canadians, highlighting the sector's role in empowering communities, preserving culture, protecting natural assets and driving economic growth. The Index is comprised of six interconnected components, namely economy, employment, enablement, environment, engagement and experience (Destination Canada, 2025[63]).

Costa Rica's Social Progress Index has since 2017 tracked the relative performance of indicators on basic knowledge access, information and communications access, health and wellbeing, ecosystem sustainability, personal rights, personal freedom and choice, tolerance and inclusion, and access to advanced education, across the country's 33 tourism development centres.

Croatia has introduced sustainability indicators, carrying capacity assessments, and data-sharing mechanisms to strengthen co-ordination and support evidence-based decision making across ministries and levels of government. The Tourism Sustainable Satellite Account (TSSA), under development, will further enhance integration by providing data on tourism's economic, social, and environmental impacts. The aim of these tools is to align tourism with wider national goals for tourism to contribute to local development and well-being.

Finland measures and monitors the socio-economic impacts of tourism as part of Visit Finland´s Sustainable Travel Programme, which includes data on tourism intensity and density, inclusiveness of tourism companies, cultural sites, and Finland's ranking in relevant international indexes.

Portugal is modernising its tourism data systems to better measure and respond to the socio-economic impacts of tourism, particularly at the sub-national level. Central to this is the establishment of a nationwide network of Regional Sustainable Tourism Observatories, supported by Turismo de Portugal and aligned with UN Tourism's INSTO framework. This network, known as Destination Watch, brings together regional destination management organisations, universities and public agencies to co-produce data, improve territorial co-ordination, and inform more balanced, evidence-based policies.

The measurement of the social impact of tourism is also on the agenda of the private sector. The World Travel and Tourism Council has expanded its economic impact reporting to include the environmental and social footprint of tourism (WTTC, 2024[64]), while the World Economic Forum's Tourism Development Index includes indicators on the socio-economic impacts. Meanwhile, a report exploring the root causes of so-called ‘overtourism’ highlights the need for improved destination management and development of effective and data-driven responses to address the ‘invisible burden’ of tourism (The Travel Foundation, 2019[12]).

Policymakers can support the design and dissemination of tailored social impact measurement tools to reduce hurdles and facilitate their uptake (OECD, 2023[65]). Countries apply a wide range of methods and data sources to measure and monitor the socio-economic impacts of tourism, often tracing data across multiple different indicators and topics to capture the full range of socio-economic impacts that tourism has. These initiatives are generally aimed to provide evidence that goes beyond the economic numbers more readily available (Box 3.6).

Measuring the sentiment of residents and visitors can provide valuable insights on the social impacts of tourism. Resident sentiment can be a valuable proxy for community well-being and is becoming increasingly important in OECD countries as a way to assess public attitudes, perceptions of crowding, and quality of life impacts. Regular monitoring can help policymakers to identify emerging concerns and areas where tourism may be contributing to, or detracting from, quality of life. Visitor sentiment can help gain insights on the visitor experience and accessibility to enhance service quality and product development and can provide valuable information on visitor perceptions of crowding, safety, hospitality, and cultural authenticity in destinations, which can facilitate strategic planning.

Innovative methods that integrate traditional statistical sources with new data, indicators, and analytical tools present opportunities to improve the measurement of the socio-economic impacts of tourism, as well as to more accurately monitor progress and evaluate the effectiveness of public policies. Integrating official statistical sources, administrative data, and innovative sources, such as data from mobile phones and credit card transactions, can improve the timeliness and granularity of tourism data, thereby enhancing the ability to capture real-time tourism dynamics, visitor flows and mobility, and economic impacts, including at sub-national level (OECD, 2025[66]). Such data also present opportunities to develop tools for forecasting tourism demand, which can inform resource allocation and support sustainable destination management.

Further work is needed to strengthen the measurement of the social impacts of tourism on local communities. Quantifying the pressure that tourists place on healthcare, transport, sanitation, and public space remains an area for further development. Potentially relevant areas of research include: cost of public services per tourist night, especially in municipalities with high day-visitor volumes; public transport and road congestion linked to seasonal tourism; waste and water use at municipal level attributable to tourism, including cruise traffic; and visitor carrying capacities of heritage sites and natural parks. Although the economic impacts are generally well understood, there is limited knowledge on the extent to which the value remains in local economies, particularly in low-density or emerging destinations. Indicators on leakage have the potential to improve this understanding, for example though the share of locally produced goods and services in tourism consumption, SME participation rates in the tourism value chain, and tourism value-added per region and per type of destination. The impact of tourism, and in particular short-term rentals, on the housing market requires further investigation.

Policy considerations to enhance the social benefits of tourism

Addressing unbalanced tourism development requires a better understanding and consideration of the complex and cross-cutting nature of the sector. It is also important to adopt an integrated approach, taking into consideration the views of tourism operators and local communities, mainstream sustainable policies and practices, develop more sustainable tourism business models, and improve tourism measurement to determine the desired type and scale of tourism appropriate for individual destinations (OECD, 2024[1]; OECD, 2021[4]). Strong governance structures, at all levels, and reliable evidence are required to better manage tourism, especially as the sector navigates large-scale social, economic, political, environmental, and technical trends.

As demand for tourism continues to grow, a paradigm shift in the perception of tourism 'success' is required, moving beyond traditional economic and visitor metrics, together with a greater focus on the environmental and social pillars of sustainability (OECD, 2024[1]), while at the same time recognising that transforming the sector will take time. Solutions need to be crafted to avoid unintended consequences, with policies informed by robust evidence of their effectiveness, taking into account both the resident population as well as the tourists.

Based on the analysis discussed in this chapter, key policy considerations to enhance the social benefits of tourism for destinations and local communities include:

- **Place-based and people-centric policies are needed to meet the needs of local communities and mobilise local assets**. Recognising the unique characteristics of destinations supports the development of tailored strategies and investments to strengthen competitiveness, sustainability and economic resilience in the face of transitions and shocks. As consumer preferences and societal dynamics evolve, destinations must continually adapt tourism models and policies to align with the local identity and tourism goals. Additional work is needed to explore how governments can support such policies, and how tourism impacts and policy needs differ by type of destination.
- **Strong co-ordination between policymakers at the national and destination level is central to maximising the social benefits of tourism**. Clear communication helps to align priorities and avoid duplication. Governance frameworks that empower local actors to implement context-sensitive solutions should also remain consistent with broader policy objectives. While some issues such as infrastructure planning and community engagement are often best addressed locally, other issues such as regulatory standards and funding mechanisms may require national oversight.
- **Adopt integrated, participatory approaches that embed tourism within broader economic development strategies**. This includes efforts to spread the benefits of tourism both spatially and temporally, coupled with targeted efforts to prepare less-visited areas for potential tourism flows to avoid simply shifting pressures from one location to another. While tourism remains a key economic driver, it should form part of a diversified regional development strategy.
- **Invest in public assets that benefit both residents and visitors**. Strategic investments in transport, healthcare, utilities, and environmental management can support fluctuating tourism demand while enhancing year-round community well-being. Tourism-related taxes are one available tool to help finance these investments. Transparent communication on how such revenues are used can strengthen stakeholder trust and legitimacy for such measures. Any regulation of short-term rentals should be designed to balance the economic benefits of tourism against the pressure that it can place on local communities, particularly in relation to housing availability.
- **Encourage business models and practices that ensure a more even distribution of tourism benefits**. Supporting locally owned tourism enterprises and fostering public-private partnerships can help retain income within destinations, strengthen community pride, and preserve cultural identity. Targeted skills and training programmes can expand employment opportunities for local residents and promote sustainable, competitive sector growth.
- **A deeper understanding of the potential social impacts of tourism** is needed to better manage trade-offs, enhance economic development and support well-being in both established and emerging destinations. This includes improving insights into how tourism generates value for destinations and the different types of potential trade-offs that destinations need to consider, to better share the benefits (and costs) more widely and evenly shared across communities.

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Notes

[1] On average, across all countries, 1 USD of non-resident expenditure results in 89 cents in domestic value-added and 11 cents in foreign value-added.

[2] Administrative divisions run by a governor.

Chapter 4. Adapting tourism to extreme weather-related events

The increasing frequency and intensity of extreme weather-related events is reshaping the operating environment for tourism, with growing implications for destinations, businesses, workers and travellers. Hazards such as heatwaves, wildfires, floods and storms are disrupting tourism activity, damaging natural and built assets, and altering travel patterns across regions and seasons. These changes are introducing more complex and interconnected risks, requiring a stronger focus on resilience and long-term adaptation. This chapter examines the impacts of extreme weather-related events on tourism and showcases country response initiatives. It explores how improved risk assessment and early warning systems, integrated governance and planning, infrastructure adaptation and capacity building can enhance the sector's resilience. Key policy considerations are identified to strengthen the adaptive capacity of destinations.

Extreme weather-related events are typically described as unusual, severe, or unseasonal weather phenomena that occur infrequently but with significant intensity, often causing substantial disruption to societies, economies, and ecosystems. They include hazards such as extreme heat, droughts, wildfires, heavy precipitation, flooding, mudslides and intense storms. Tourism is particularly affected by such events for several reasons: many tourist attractions and activities are experienced outdoors; tourism infrastructure is often located in more risk-prone areas, including coastal and mountainous areas; and tourists are often not acclimatised to local climate conditions and are therefore less well informed about common risks and necessary behaviour in response to such events.

The sector has demonstrated resilience in the past in its ability to respond to the impacts of extreme weather-related events. However, the increasing frequency and intensity of such events, combined with the growing number of tourists and tourism assets in recent decades has elevated the need to address the issue and seek ways to better cope with the consequences of extreme weather events. Looking ahead, it is anticipated that such events will intensify, with implications for tourism. For example, more frequent and intense heatwaves in mid-latitude destinations such as the Mediterranean have the potential to discourage tourists from booking holidays during peak summer months and instead travel to more temperate destinations (Steiger et al., 2024[1]).

Distinguishing between preparedness, responses, and adaptation is important for managing extreme weather in tourism. Preparedness involves proactive planning and risk reduction before events, such as early warning systems and evacuation protocols. Responses are the immediate actions taken during or after an event to protect lives and minimise damage, while adaptation refers to longer-term adjustments – like redesigning infrastructure, shifting tourism seasons, or diversifying offerings – to cope with more frequent and severe hazards.

Policy plays a key role in shaping tourism's resilience (OECD, 2022[2]). Preparing the sector for adaptation to extreme weather-related events is necessary to secure this important economic pillar, particularly for regions dependent on tourism. This requires proactive governance, cross-sector collaboration and the systematic integration of adaptation into tourism strategies and development. Countries are increasingly recognising the benefits of adopting sectoral approaches as part of national adaptation and disaster risk management plans, to strengthen intersectoral co-ordination and preventive action in the face of extreme weather-related events, thereby achieving greater resilience for tourist destinations and services.

This chapter provides an overview of the impact that changing weather conditions and extreme weather-related events can have on the tourism sector, drawing on survey responses from OECD and partner countries. It showcases country response initiatives and examines policy responses and adaptation options to minimise impacts on tourism destinations and businesses.

Trends in changing weather conditions and extreme weather-related events

The frequency, duration, and intensity of extreme weather events have increased considerably in recent decades, with serious consequences for economies, ecosystems, human health, and societies (OECD, 2025[3]). Temperature extremes are one of the clearest signals of change. Heatwaves have grown longer, more intense, and more widespread, with well-documented increases in Europe, Asia, Australia, and North America. In Europe, maximum summer temperatures and the occurrence of heatwaves have increased, whereas the frequency of extreme cold spells has decreased. An estimated 12% more people in OECD and partner countries were exposed to such conditions in 2019-23 compared to the reference period 1981-2010. In 2024, the world experienced its hottest year on record, a milestone that concluded a decade of the ten hottest years ever recorded (OECD, 2025[3]).

A combination of high heat, low humidity, and strong winds has also heightened the probability of wildfire outbreaks in many regions (OECD, 2024[4]). In response to record-breaking wildfires across every forested continent over the past decade, G7 Leaders adopted the Kananaskis Wildfire Charter in 2025 – a landmark commitment to scale up wildfire prevention, preparedness and recovery. The Charter seeks to leverage a range of approaches including, sustainable forest management, nature-based solutions, Indigenous land practices such as controlled burning and targeted fire risk reduction measures around communities, buildings and infrastructure (Lavaud and Gamper, 2025[5]).

Precipitation extremes have also intensified. Evidence shows that heavy rainfall events have become more frequent and more intense across most land regions. This trend has already translated into a higher risk of flash floods and surface water flooding because intense rainfall increasingly overwhelms natural and artificial drainage systems, which can also trigger landslides. Such flooding can threaten people's lives, including tourists, livelihoods and economic infrastructure.

Storm-related extremes show a similar pattern of intensification. Rainfall associated with tropical cyclones has increased, and the most powerful cyclones have shown higher peak wind speeds and greater destructive potential. Severe convective storms (e.g. thunderstorms), often associated with heavy rainfall, strong winds, lightning, hail, and even tornadoes, have also become more damaging in some regions.

Importantly, these shifts are not confined to isolated events but increasingly manifest as compounding and cascading hazards. For example, the probability of compound flooding (when two or more flood drivers occur simultaneously or in close succession) has already risen in some coastal areas due to the combined effects of sea level rise, heavier precipitation, and storm surges. More broadly, the land area affected by concurrent extremes, such as simultaneous drought, heat, and wildfire risk, has expanded over recent decades, creating more complex and interlinked risks for societies and economies (Seneviratne et al., 2023[6]).

Looking ahead, it is anticipated that extreme weather events will intensify, with fire weather conditions projected to become more frequent in parts of southern Europe, Australia, and the Americas (Seneviratne et al., 2023[6]). Similarly, heavy precipitation events are expected to intensify, likely translating into more frequent and severe flooding in both urban and rural settings, if existing drainage and flood protection systems are overwhelmed.

These projected changes pose profound risks for tourism, given the sector's strong dependence on natural attractions and safe conditions for travel. To safeguard the long-term resilience of tourism, proactive policies and investments are needed to prepare the sector for the growing scale of extreme weather impacts.

Impacts of extreme weather-related events on tourism

While the frequency and intensity of extreme weather-related events are increasing, their macroeconomic and tourism impacts remain poorly understood. OECD estimates indicate that the most severe extreme weather events reduce regional GDP by 2.2%, with losses of around 1.7% persisting after five years. Spatial spillovers are negative and economically significant: a severe disaster occurring within 100 km of a region leads to a further 0.5% decline in GDP – equivalent to almost a quarter of the direct impact. Aggregated across time and countries, extreme weather events are associated with average annual output losses of over 0.3% of GDP in OECD countries, with spillovers accounting for approximately half of the total impact. The capacity to withstand and recover from disasters also varies significantly, with richer, more economically diverse regions, and those with greater population mobility, typically more resilient (Costa and Hooley, 2025[7]).

These events can reshape tourism destinations through damage to infrastructure and natural resources, as well as impacting how they function at different times of the year. This can lead to significant impacts on the health and comfort of tourists and workers, and more widely, the geography and seasonality of global tourism.

Damage to infrastructure, operational disruptions and natural attractions

Responses to a survey of OECD and partner countries reinforce that extreme weather-related events are increasingly disrupting tourism around the world. Many countries reported that such events affect tourism both directly – through road and airport closures, infrastructure damage, closure of outdoor attractions and/or cancellation of festivals and events – and indirectly, by harming the reputation of destinations and deterring future visitors.

Extreme temperatures and heatwaves are triggering widespread operational challenges for tourism businesses, including cooling, refrigeration, and water loss, often driving up operational costs and compromising the reliability of essential services. Furthermore, wildfires linked to extreme heat and drought have emerged as a significant threat and highly destructive hazard for tourism destinations. Many parts of the world now face annual threats to natural landscapes and the built environment that can also deter travellers, often during peak tourism seasons:

- Canada: In 2024, extreme drought and heat fuelled unprecedented wildfires near Jasper, Canada, during the peak tourist season, and causing an estimated CAD 4.5 million in lost tourism revenue per day (Box 4.1).
- Portugal: A 1% increase in total burned area per municipality was estimated to reduce tourist arrivals by 3.5% in the following year, with estimated annual losses of up to EUR 35-62 million by the 2030s and EUR 128-208 million by the 2050s (Steiger et al., 2024[1]).
- United States: Wildfires in Maui in 2023 caused an estimated total damage of USD 5.5 billion and led to a USD 1 billion loss of tourism revenues even one year after the fires (Murphy, 2024[8]).

Tropical storms, cyclones and hurricanes can cause severe disruptions to the sector via widespread hotel and infrastructure damage, disruptions to holidays and supply-chains, temporary constraints on ground and air transport, and impacts on forward bookings. For example:

- Canada: In 2019 Tropical Storm Dorian caused flooding of over 3.4 meters in some areas of Prince Edward Island, damaging key tourism assets including sand dunes, boardwalks, parks, and campgrounds, restricting access to beaches and trails, and necessitating the rescue of some visitors (Rutty et al., 2024[9]).
- Mexico: In response to the significant impacts of Hurricane Otis and subsequent heavy rainfall and cyclone seasons in 2023, Mexico embedded adaptation and resilience as cross-cutting priorities in federal tourism policy and destination planning. *Acapulco se transforma contigo* is the flagship adaptation/recovery programme, with MXN 3 000 million allocated in 2025 for integrated actions on water, sanitation, flood prevention, mobility, urban services, and tourism revival.
- New Zealand: Cyclones and floods in early 2023 led to an estimated loss of regional tourism GDP of NZD 1.6 million due to cancelled visitor bookings, losses in business revenues of NZD 28 - 69 million and losses of NZD 5 million in government-managed visitor assets.
- United States: Hurricane Irma's landfall in Florida in September 2017 led to an 11.6% decline in hotel bookings, a reduction of 1.8 million tourist arrivals, and an estimated loss of USD 1.5 billion in tourism spending.

The increasing frequency and intensity of storms, floods, and droughts are also damaging sensitive ecosystems such as reefs, mangroves, wetlands, and alpine vegetation, stripping landscapes of their biodiversity and scenic value and threatening activities like wildlife watching, nature photography, and adventure tourism (Wolf et al., 2024[10]; Steiger et al., 2024[11]). For example, Australia's Great Barrier Reef experienced its sixth widespread bleaching event since 2016 over the 2024–25 summer. Heavy monsoonal rainfall and Tropical Cyclone Koji increased freshwater flows and reduced salinity with likely impacts on coral reefs, beaches and islands. Significant management and conservation efforts are underway to protect these vital ecosystems and the tourism sector they support.

Box 4.1. Tourism vulnerability to extreme weather events – Jasper wildfires, Canada

Located in Alberta's Rocky Mountains, Jasper National Park is one of Canada's premier tourism destinations, welcoming around 2.4 million visitors annually. Tourism accounts for nearly half of local employment (49%), making the community of roughly 4 700 residents highly dependent on a stable visitor economy. In July 2024, extreme drought and heat fuelled unprecedented wildfires near Jasper during the peak tourist season. Within two days, 25 000 residents and visitors were evacuated, and fires subsequently destroyed about 30% of structures and over 800 housing units. The fires caused an estimated CAD 4.5 million in lost tourism revenue per day, while critical infrastructure damage curtailed accommodation capacity by roughly 25 % even a year later.

The event exposed multiple vulnerabilities and potential impacts of wildfires for tourism-dependent communities:

- Operational disruptions and closures of businesses and parks during the high season;
- Damage to lodges, campgrounds and trails, undermining the visitor experience;
- Severe smoke impacts reducing air quality and visibility across the wider region;
- Reputational damage from global media portraying Canada as "engulfed in flames," leading to cancellations, even in unaffected areas;
- Housing and labour shortages aggravated by the loss of staff accommodation; and
- Rising insurance costs and limited coverage slowing business recovery.

Recovery has been buoyed by co-ordinated emergency management and national adaptation initiatives, including Canada's Wildfire Resilient Futures Initiative and regional programmes such as FireSmart Canada. The Department of Innovation, Science and Economic Development is undertaking exploratory work to link Statistics Canada's data on tourism businesses and employment with Natural Resources Canada's geospatial information on weather-related risks, such as the Canadian Wildland Fire Information System and the Flood Susceptibility Index. The resulting integrated dataset would allow policymakers to better map tourism activity in hazard-prone areas and assess exposure and potential socio-economic impacts on tourism operations and jobs. The Jasper case highlights the need for tourism-specific preparedness and recovery mechanisms, improved communication strategies, and investments in community and infrastructure resilience as extreme weather events intensify.

Impacts on the health and comfort of tourists and workers

Extreme heat is becoming a defining feature of peak travel seasons in some destinations, prompting shifts in tourist behaviour. Cities such as Lisbon, Portugal have recorded significant declines in visitor satisfaction on hot days, with tourists shortening their time spent outdoors, reducing the number of attractions visited and in extreme instances it can lead to the postponement or cancelling of trips altogether. Activities that were once highly attractive to travellers – such as hiking, cycling, and cultural sightseeing – are increasingly perceived as uncomfortable or even hazardous during prolonged heatwaves, leading to a growing demand for shaded, air-conditioned, or indoor experiences (Steiger et al., 2024[1]).

Tourism workers, particularly those employed in outdoor or non-air-conditioned environments, also face increased exposure to dangerous heat conditions. Prolonged exposure can lead to chronic health problems, such as cardiovascular strain, as well as acute impacts like dizziness and fainting, which not only threaten staff well-being but can also reduce productivity and the overall resilience of the tourism sector (Becken et al., 2025[12]). In destinations with limited infrastructure or resources, these risks are amplified, with workers often lacking access to cooling facilities, hydration stations, or adequate rest periods during extreme heat.

The consequences of rising temperatures extend beyond direct heat stress. Warmer climates facilitate the spread of vector-borne diseases such as dengue fever, chikungunya, and malaria, which can discourage travellers from visiting affected regions and place additional burdens on local healthcare systems (Dube et al., 2024[13]). Vulnerable populations – including the elderly, children, those with pre-existing health conditions, and individuals from low-income backgrounds – are at particular risk, especially in areas with inadequate shading, cooling, and healthcare services (Dube et al., 2024[13]; Wolf et al., 2024[10]). For small tourism enterprises and low-income workers, the lack of financial and institutional resources further reduces their ability to mitigate and respond to escalating risks (Becken et al., 2025[12]).

Reshaping the geography and seasonality of tourism

Extreme weather events are altering the geography and seasonality of global tourism, impacting both the destinations people choose and the timing of their trips. Rising temperatures are impacting tourist comfort and prompting some to avoid destinations that have traditionally attracted summer visitors, especially lowland and urban areas in (sub)tropical and arid regions. Increasingly, travellers are seeking more temperate, higher-altitude and high-latitude destinations where temperatures remain more comfortable in peak summer months, often referred to as “Coolcations” (EU Tourism Platform, 2025[14]; World Economic Forum, 2024[15]). This shift has the potential to benefit regions such as northern Europe, Canada, and alpine regions, which stand to gain visitors as their climates become more favourable during summer, particularly relative to many urban and coastal destinations in warmer regions.

Results from the Icelandic Tourist Board’s border survey 2024 indicate that Iceland’s climate conditions (cool temperature and air quality) had “some” to a “significant” influence on the decision of nearly half of all foreign tourists who chose to visit Iceland over the previous year. Lithuania has launched a coolcation initiative targeting tourists from Southern Europe, to access this emerging market, (We Love Lithuania, 2025[16]).

While coolcation destinations may experience extended peak seasons, and increased tourism revenues and employment opportunities, such growth also presents challenges, including the need to develop additional infrastructure, manage potential environmental degradation, and prepare for other potential fluctuations in seasonal demand. For example, in Canada, while the warming climate may prolong the summer tourism season, it also places a strain on winter tourism, reducing the number of days where visitors can ski, skate, or engage in other outdoor winter activities (Steiger et al., 2023[17]). Polar tourism could benefit from diminishing sea ice opening new routes for cruises. However, increasing polar tourism accelerates environmental pressures (Demiroglu et al., 2024[18]). On the other hand, the competitiveness of heat-prone destinations such as the Mediterranean, the Middle East, small island developing states (SIDS) and tropical countries will be undermined by more frequent heatwaves.

Beyond spatial redistribution, changing seasonal conditions are reshaping the timing of travel. Traditional “sunlust” destinations – those sought for hot, sunny conditions – may see declines in peak summer demand as temperatures surpass comfort and safety thresholds. In response, some tourists are shifting their visits to the spring or autumn, providing some potential for seasonal rebalancing (Becken et al., 2025[12]; Steiger et al., 2024[1]; Steiger et al., 2024[11]). This temporal shift offers both opportunities and challenges: while it may help destinations spread visitor loads across the year, reduce summer overcrowding, and generate more consistent revenue streams, it also necessitates strategic adjustments in workforce planning, hospitality services, and infrastructure investments to accommodate more evenly distributed tourist flows.

Measures to minimise the impacts of extreme weather-related events on tourism

A broad set of adaptation measures tailored to specific destinations, tourism subsectors, and levels of governance are required to reduce or mitigate the impacts of changing weather conditions on tourism.

Risk assessment, early warning, and emergency response

Risk assessment, early warning, and emergency response form the backbone of strategies designed to protect tourism destinations from the growing threat of extreme weather-related risks. These strategies are not only about reducing the immediate dangers posed by such events but also about ensuring that tourism economies can withstand and recover from these shocks. Effective risk management begins with thorough, systematic assessments of vulnerability and exposure, which help destinations identify where their weaknesses lie and what measures are most urgently required. Tools such as the Tourism Exposure Index (León-Cruz, Neger and Gössling, 2025[19]), the Holiday Climate Index (Scott et al., 2016[20]), or snow reliability assessments in snow-based tourism (Steiger and Scott, 2020[21]) are increasingly useful for pinpointing high-risk regions and assessing the potential for adaptation measures at the destination level. Country examples include Switzerland's Snow Compass, which provides online dashboards with data on the formation and melting of natural snow cover and the current and forecast number of hours available for snowmaking, differentiated by region and altitude, as well as strategic options for adaptation to changing seasons. Similarly, the Climate Change Cockpit in Austria, aims to support evidence-based tourism adaptation by providing information on snow reliability and heat stress.

While risk assessment provides the foundation, it is only through integrated monitoring and early warning systems that destinations can translate this information into actionable measures. Enhanced meteorological data integration, paired with localised warning mechanisms, can make a substantial difference in preparedness. These systems must be designed with tourists in mind, as visitors are often less familiar with local hazards and lack access to critical information. Early warning systems, when paired with effective communication channels, can provide real-time updates on emerging threats, guiding both tourists and operators to take timely precautions (Scott et al., 2024[22]). Such systems include multilingual alerts, mobile applications, and partnerships with hotels and tour operators to ensure the widest possible reach. Examples include:

- Austria: Introduced in 2024, "AT-Alert" is a warning system where all cell phone users including tourists are informed in the event of an emergency within a defined region.
- Canada: The National Public Alerting System is a federal, provincial, and territorial system that enables emergency management organisations across Canada to warn the public about imminent or possible dangers such as floods, tornados, fires, and other disasters. Warnings are area-specific (geo-targeted). When an alert is issued, it is broadcast on television and radio and sent to mobile phones connected to an LTE (long-term evolution) or newer (e.g. 5G) network.
- Croatia: The 112 Croatia App, developed by the Civil Protection Directorate of the Ministry of the Interior, issues location-based alerts (e.g. on storms, fires) and links the users to the 112 emergency system. It is designed to be compatible with the EU-wide Public Warning System (EU-ALERT) and complements Croatia's national cell broadcast alert service.
- Europe: MeteoAlarm is an early warning dissemination system that aggregates, visualises, and provides awareness information from 41 European National Meteorological and Hydrological Services in an accessible manner.
- Japan: "Safety Tips", a multilingual disaster alert service for international visitors. It provides real-time push notifications in 15 languages on earthquakes, tsunamis, and weather warnings, along with evacuation procedures and links to nearby facilities. Some local governments have introduced digital maps tailored for tourists. These maps function as ordinary sightseeing guides

during normal conditions but automatically switch to displaying evacuation sites in the event of a crisis. This allows visitors to take prompt action to ensure their safety.

- Saudi Arabia: An Automated Early Warning System with real-time, color-coded alerts for extreme weather disseminates information via SMS and social media.

The Destination RiskScan initiative developed in the Netherlands is described as a science-based climate risk management toolkit, which aims to support destination policymakers anywhere in the world to map their tourism climate risk profile to help make informed policy decisions (Box 4.2).

Box 4.2. Destination RiskScan to empower destinations to address extreme weather-related risks

Destinations often lack a comprehensive understanding of the potential impacts of extreme weather risks. Such knowledge is important for the prioritisation of investments and innovations for positive resilience, strengthening the capacity of destinations for transformation, learning and adaptation. The Destination RiskScan is designed to address this gap. It is an initiative developed by the Centre of Expertise: Leisure, Tourism and Hospitality together with Breda University of Applied Sciences and NHL Stenden in the Netherlands, in partnership with the Travel Foundation and Risklayer.

It consists of an open-source methodology and two tools: a publicly accessible and easy-to-use online climate risk scan complemented by an offline simulation game for use in resilience planning workshops. Combining regional, national, and systemic data for different climate risk factors and related exposure and vulnerability dimensions, the online climate risk scan will provide destinations with an easy-to-understand report of their tourism climate risk profile. Using this risk profile as starting point, the simulation game aims to assist policymakers to prioritise policy actions within their own governance context, providing insights on the trade-offs that destinations face when planning for positive resilience. There are currently six pilot destinations across the world contributing to testing and refining the toolkit: the Canary Islands (Spain); Colorado (USA); the Cook Islands; the Dolomites (Italy); Koh Samui (Thailand); and Queenstown (New Zealand).

The role of real-time weather information services cannot be overstated in bolstering these efforts. Tourists and operators must have access to accurate, up-to-date data on approaching cyclones, floods, and other severe weather events, as this allows them to adapt plans and make informed decisions (Dube et al., 2024[13]). For example, in Costa Rica, the National Emergency Commission, the National Meteorological Institute, and other entities provide systems and communication with local communities for prevention and prompt action. These services can be integrated into mobile apps, local broadcast systems, and even wearable technologies for outdoor tourists. Moreover, crisis management plans must extend beyond immediate evacuation and focus on business continuity, helping tourism operators reopen quickly after disasters and supporting local economies that rely heavily on visitor spending. This is particularly critical for island and coastal destinations, where a single extreme event can wipe out entire tourist seasons and devastate local livelihoods (Wolf et al., 2024[10]).

Beyond forecasting and warnings, strengthening civil defence and emergency management protocols in destinations can help to ensure rapid and co-ordinated responses when disasters strike. Tourism is one component within these broader emergency management frameworks, with sector-specific measures integrated into national and local protocols. This integration can help to ensure that visitors, alongside residents, are protected and that tourism operations contribute effectively to overall resilience. This involves more than government-led interventions; tourism operators, local businesses, and communities must all be active participants. Training tourism staff in emergency preparedness ensures they can assist with evacuations, provide accurate information, and support tourists during crises. Incorporating tourism assets, such as resorts and transportation networks, into national and regional crisis response plans improves co-ordination and resource allocation.

Community engagement also plays an important role, as informed and prepared residents can help facilitate smoother evacuations and recovery efforts. Standardised emergency protocols tailored to tourism-intense, high-risk zones can help to minimise loss of life and economic disruption (Higham et al., 2024[23]). For example, the province of British Columbia, Canada, has established the Tourism Emergency Management Framework, a system designed to protect visitor safety, sustain tourism businesses, and maintain the province's reputation as a safe and welcoming destination. The framework incorporates the four phases of emergency management – mitigation, preparedness, response, and recovery – and promotes collaboration among agencies, governments, Indigenous communities, and federal partners to co-ordinate resources and decisions during emergencies (Government of British Columbia, May 2022[24]).

Ideally, emergency response and risk management frameworks should adopt a layered approach, blending proactive planning with reactive measures. This includes developing localised risk management plans, establishing evacuation routes and shelters, and co-ordinating insurance and contingency strategies for both visitors and tourism businesses to manage financial risks (Fang et al., 2024[25]). In Israel, the Ministry of Tourism has integrated a specific chapter on Extreme Weather Conditions into the National Master Folder for Emergency Situations. Developed with the National Emergency Authority, this allows for better management of tourist safety during heatwaves, floods, and storms.

Despite the growing awareness of associated risks, few countries have concrete figures or measurable data on the economic and social impacts of such events for tourism. Quantification remains challenging, partly because it is difficult to estimate specific economic losses or calculate insurance claims for the sector, due in part to a lack of reliable data and systematic monitoring tools. Countries have underlined, however, that such information is essential to inform thorough risk assessments and to design targeted measures to adapt to the impacts of weather events. Addressing this gap will be crucial for governments and the tourism sector to better anticipate risks, improve preparedness, and strengthen resilience in the face of a changing weather extremes and related events.

Governance, planning and policy integration

Adaptation to extreme weather-related events in tourism requires a comprehensive, multi-level approach that not only focuses on immediate risk reduction but also builds long-term resilience across destinations. A resilient tourism sector protects livelihoods and communities, while adapting to the challenges of an uncertain future (OECD, 2022[2]). In 2025, under the G20 Presidency of South Africa, Tourism Ministers highlighted the critical role of resilience with the development of an Action Plan for Enhanced Resilience in Inclusive, Sustainable Tourism Development, which sets out a strategic roadmap for strengthening the tourism sector's ability to withstand and adapt to not only environmental but health-related, economic and geopolitical shocks, while promoting opportunities for all and long-term sustainability. Similarly, the forthcoming EU Strategy for Sustainable Tourism aims to shape a competitive, sustainable and inclusive tourism model that aligns with Europe's environmental goals, supports local communities, and strengthens the sector's resilience to crises, including extreme weather-related events.

Integration begins with strengthening institutional co-ordination, mainstreaming adaptation within national and regional policies, and developing robust planning frameworks that respond to both current and projected increases in extreme weather events. Tourism planning that addresses disaster risk reduction and adaptation to such events, can help to reduce the sector's vulnerability by ensuring that zoning laws, building codes, and infrastructure investments are adequately recalibrated (Higham et al., 2024[23]).

Adopting such an approach involves proactive measures, including hazard mapping and scenario planning, so that destinations can anticipate future risks rather than merely reacting to events after they occur. Localised adaptation plans are particularly important for destinations with a high dependence on tourism revenues, where the economic stakes are significant. These plans often include the reinforcement of critical infrastructure, diversification of tourism offerings to reduce reliance on at-risk attractions (such as snow-based activities, or diving tourism), and enhanced seasonal flexibility to distribute visitor flows more evenly throughout the year (León-Cruz, Neger and Gössling, 2025[19]). In the Slovak Republic, for example, public support and investment are shifting from developing skiing infrastructure in lower-altitude ski areas. Instead, efforts are moving towards supporting alternative tourism activities that are less dependent on snow and more resilient to changing climatic conditions. In France, the *Avenir Montagnes* (Future of Mountains) Plan mobilises approximately EUR 650 million in public funding for investment and technical support to diversify tourism offers, accelerating the ecological transition, and revitalising the tourist real-estate market.

A key component of advancing adaptation in tourism lies in fostering robust governance and institutional co-ordination that spans across multiple sectors and levels of administration. Regional Destination Management Organisations (DMOs) can be instrumental in this effort, as they can co-ordinate cross-municipality strategies, create synergies between local and regional actors, and mobilise public-private partnerships to fund and implement adaptation projects (OECD, 2021[26]). These organisations are also positioned to strike a balance between urgent, short-term actions - such as post-disaster recovery - and longer-term strategic planning that anticipates emerging climate challenges (Becken and Loehr, 2024[27]). To minimise the potential impacts and disruption resulting from extreme weather-related events, national tourism organisations and DMOs can take steps to embed adaptation not only into destination development plans but also into marketing strategies, shifting the emphasis from pure growth toward sustainable development and risk mitigation (Gössling et al., 2024[28]; OECD, 2024[29]).

Building institutional capacity within DMOs and developing standardised adaptation indicators for monitoring and accountability, can help to measure progress, identify shortcomings, and guide further action. Sectoral co-ordination is also important; tourism cannot adapt in isolation from related sectors including transportation, energy, emergency management, and public health, all of which play integral roles in ensuring visitor safety and destination resilience (Gössling et al., 2023[30]). The Sendai Framework for Disaster Risk Reduction 2015-2030 (UNISDR, 2015[31]), underscores that effective multi-level and multi-sectoral co-ordination and co-operation, involving governments, private actors, communities, and international organisations, is necessary to ensure coherent and effective disaster risk management for crises impacting tourism, across all stages of prevention, response, and recovery.

At the destination level, effective adaptation requires not only planning but also the implementation of concrete strategies to address extreme weather-related risks. Nature-based solutions, such as dune restoration, wetland rehabilitation, and reforestation, provide dual benefits of protecting coastlines and ecosystems while enhancing destination appeal. Retrofitting or relocating vulnerable infrastructure, designing heat-resilient urban environments with natural shading, cooling corridors, and water features, and investing in multimodal transport systems resilient to floods or storms further reduce long-term risks. Practical examples highlight the diversity of these measures: Small Island Developing States have invested in seawalls and dune systems to protect beaches and resorts. In urban settings, hotels incorporating elevated structures, passive cooling techniques, and rainwater harvesting illustrate how businesses can adapt at the facility level (Wolf et al., 2024[10]). In the EU, a new set of practical guidelines, developed under the Sustainable Tourism Partnership of the Urban Agenda for the EU offers cities and regions concrete support to embed resilience into their tourism strategies, marking a significant step forward in translating strategic ambitions into local-level action (Urban Agenda Sustainable Tourism Partnership, 2025[32]). In New Zealand, regional destination plans increasingly include Māori perspectives and resilience elements, reflecting a commitment to effective governance and sustainable stewardship (Higham et al., 2024[23]).

Broader governance and policy integration measures are equally important to ensure that tourism adaptation is mainstreamed into national and global strategies. For example, since 2010, the tourism sector in Costa Rica has played an active role in planning efforts to integrate climate adaptation into public policy, including Nationally Determined Contributions (NDCs) and vulnerability and risk assessments for extreme weather events in specific regions, to ensure that tourism specific perspectives and adaptation needs are addressed. Integrating tourism-specific adaptation measures into NDCs enables some countries to align the sector with their overarching climate commitments, while also strengthening the long-term resilience and competitiveness of tourism. This integration provides clear policy direction and stretches targets for the sector, creating stronger incentives for businesses to innovate, reduce their environmental footprint, and make tangible progress towards adaptation targets (OECD, 2022[33]). At the same time, it ensures that tourism, which is often a substantial emitter and highly vulnerable sector, is not left out of national strategies, thereby fostering accountability and coherence across the economy. Furthermore, the alignment of tourism and broader policies at both national and sub-national levels ensures coherence and prevents gaps in implementation.

The inclusion of tourism in National Adaptation Plans represents a key step toward institutionalising adaptation across policy frameworks but are still not a common occurrence (Becken and Scott, 2024[34]). Some countries are using tourism specific adaptation plans or the sector's inclusion in wider adaptation strategies to prepare for the impacts of extreme weather-related events (Box 4.3).

Box 4.3. Adaptation strategies as a tool to prepare for extreme weather-related events – selected country approaches

Many countries already undertake national climate risk assessments and have developed strategies to strengthen resilience and adapt to the growing impact of extreme weather-related events. Adaptation strategies serve as a key framework to better prepare for and manage risks arising from these events. They provide a structured approach for integrating adaptation considerations into sectoral and territorial policies. Importantly, these strategies are increasingly recognising the vulnerability of the tourism sector, which is a critical economic activity for many countries.

As part of **Ireland's** National Adaptation Framework 2024, tourism was identified as one of 13 priority sectors required to prepare or update Sectoral Adaptation Plans. Launched in November 2025, the Tourism Sectoral Adaptation Plan 2025-2030, is Ireland's first for tourism and seeks to identify both the challenges and opportunities presented by a changing climate for the sector, with the aim of maintaining Ireland's appeal to tourists and supporting resilient communities through the provision of employment and economic opportunities.

Peru's National Climate Change Adaptation Plan explicitly includes the tourism sector, recognising the significant effects of climate change on tourism and the need for sector-specific resilience measures. Similarly, **Spain's** National Climate Change Adaptation Plan 2021–2030 considers selected ecological systems and socio-economic sectors for impact assessment, vulnerability studies and adaptation to climate change, including tourism. It sets out clear lines of action, assigns responsibilities to entities and collaborators, establishes compliance indicators, and specifies whether regulatory instruments are needed and how funding will be mobilised.

Many national tourism strategies integrate considerations to address changing climatic conditions. For example, the **Slovak Republic's** Strategy for the Development of Sustainable Tourism to 2035 acknowledges it as a cross-cutting challenge affecting the future of the tourism sector. While the Sustainable Tourism Development Strategy of **Croatia** and **Korea's** 4th Basic Plan for Tourism Development both address increasing weather-related risks and highlight the importance of adaptation responses.

Turismo de Portugal actively participates in the National Strategy for Adaptation to Climate Change in Portugal, making it possible to raise awareness of the impacts of the changing climate on tourism and to outline concrete mitigation and adaptation measures. A Climate Action Agenda for Tourism is also currently under development, with the objectives of integrating climate risk into tourism management policies, instruments and practices; promoting the climate transition of tourism enterprises; increasing the resilience of tourism destinations and promoting cross-sectoral and territorial coherence.

Chile has developed the Sectoral Plan for Adaptation to Climate Change in Tourism (2025–2030), a strategic roadmap mandated by the country's Framework Law on Climate Change. The Plan aims to strengthen the resilience of the tourism sector, through knowledge generation, awareness-raising, diversification of tourism experiences, destination preparedness and recovery, and multi-level institutional co-ordination. In addition, Chile's Climate Risk Atlas (ARClim) initiative provides a set of risk maps structured as impact chains, organised across multiple sectors, including tourism. ARClim assesses risk by combining three core components – climate hazard (threat), exposure and sensitivity – to characterise how climate change may affect different systems at the municipal scale. For tourism, key risks highlighted include: reduced winter attractiveness in high-mountain ski resorts due to declining snow conditions; losses of natural and landscape-based attractions due to increased forest fires; reduced appeal of sun-and-beach destinations due to more frequent/intense coastal wave events, beach erosion and coastal flooding; and increased presence of jellyfish in beach areas associated with warmer sea surface temperature.

In **Australia**, the National Adaptation Plan was released in 2025 in response to the findings of its first National Climate Risk Assessment. The Plan, which seeks to understand and assess climate risks and establish a framework for Australian Government action, outlines existing roles and responsibilities for adaptation and details current and future areas of focus to support adaptation. It is focused around seven systems and identifies impacts to the tourism sector under the Infrastructure and the Built Environment and Natural Environment systems.

Egypt is preparing a National Adaptation Plan that aims to build an integrated adaptation planning system by assessing climate risks at the national level, identifying sector priorities for adaptation, including tourism and antiquities, and integrating adaptation considerations into development and investment policies and plans.

Infrastructure adaptation

Upgrading tourism infrastructure to withstand extreme weather is becoming more important to secure the long-term resilience of the sector. Many tourism hotspots are located in highly exposed geographic locations, such as low-lying coastal zones or mountainous regions, where sea-level rise, floods, heatwaves, storms, and reduced snow cover threaten both visitor safety and the economic stability of local communities dependent on tourism. For example, in Israel, the Ministry of Tourism updated its "Procedure for Supporting Public Tourism Infrastructure" in 2023. It is now a prerequisite for any municipality or developer seeking government funding to demonstrate that their project planning addresses climate change adaptation (e.g., shading, water conservation, and material durability under heat), thus ensuring that all new tourism developments are resilient by design.

In coastal areas, infrastructure-based adaptation includes elevating or relocating facilities to avoid tidal and storm surge inundation, redesigning drainage systems to handle more intense rainfall, and reinforcing energy networks to ensure reliability during storms or heatwaves. By pairing these measures with investments in natural defences, such as mangrove replanting or coral reef restoration, buffers against storm surges are improved while enhancing biodiversity. Infrastructure is also being adapted to cope with diverse hazards, from flood-proof accommodation and energy-efficient cooling systems to transport networks designed to remain functional in extreme heat (Gössling et al., 2023[30]).

Beyond engineered solutions, nature-based and community-driven responses play a pivotal role in building resilience while fostering local engagement and economic opportunities. Investments in “climate-smart” infrastructure (such as energy-efficient buildings, permeable pavements to improve drainage, and vegetated stormwater systems) reduce environmental impacts while improving adaptive capacity. Diversified transport options, including multimodal systems that combine human powered mobility options such as cycling and walking, with low-emission transit, enhance accessibility even when one mode is disrupted by weather-related events.

Financial and economic instruments

Rising costs associated with infrastructure maintenance, insurance obligations, and the implementation of extreme weather adaptation strategies can place significant pressure on the financial sustainability of tourism businesses. For small and medium-sized enterprises (SMEs), which are the backbone of many tourism destinations but often operate with limited financial reserves, this pressure can be particularly difficult to manage. Many of these businesses lack the capacity to make the necessary investments in resilience, leaving them more vulnerable to future hazards and potentially threatening the stability and diversity of local tourism economies (Gössling and Reinhold, 2025[35]). Supporting these businesses requires a combination of affordable entry points and progressive investment pathways, enabling them to strengthen their resilience while maintaining competitiveness in a rapidly changing market (Box 4.4).

Rising insurance premiums or even exclusion for certain perils can be countered with investments in resilience (e.g., better flood defences) and regulation (e.g., stronger building codes, or zoning laws) that reduce risk and therefore also premiums. Subsidies or tax incentives to support resilience upgrades could help tourism businesses to reduce insurance costs, while insurance pools to which all tourism companies can contribute, thereby spreading the risk, are tools that can help to reduce insurance costs.

Public-private insurance programmes combine the risks of many policyholders within a country or region to create a large pool of independent risks. This diversification reduces the likelihood that many policyholders will suffer losses at the same time. Such programmes can take various forms to limit the losses faced by insurers, such as providing insurance, co-insurance, reinsurance, or government guarantees. They can offer (co-)reinsurance or retrocession[1] for severe events, provide basic insurance coverage for more frequent, smaller losses, or cover high-risk policyholders. In Switzerland, for example, natural hazard insurance for buildings is mandatory and premiums are uniform for all policyholders. Covered damages include avalanches, rockfalls, floods, storms and other (FINMA, 2025[36]).

Public-private co-financing mechanisms also provide a potential pathway for scaling adaptation by pooling resources for infrastructure investments - such as flood defences, resilient transportation networks, or renewable energy grids - that protect and benefit multiple stakeholders within a destination (Becken and Scott, 2024[34]).

Box 4.4. Financing instruments to minimise the impacts of extreme weather-related events – selected country examples

Austria: The central financing instrument for post-disaster aid is the Austrian disaster fund set up at the Ministry of Finance. The resources of this fund are raised through shares of income tax and corporation tax revenue, which is accessible to tourism businesses.

Belgium (Wallonia): Following floods in 2021, tourism-specific actions focused on redeploying the tourism economy and rebuilding confidence in the sector. Financial support was provided to SMEs and Horeca businesses impacted by the disaster, while campaigns promoting local tourism were launched to compensate for the decline in international visitors.

Czechia: In response to severe floods in September 2024, the Czech Ministry of Regional Development introduced an accommodation voucher scheme to encourage tourism in the affected region during spring and autumn 2025. The programme was co-financed by regional governments, with each party contributing EUR 40 000 for the spring season and the same amount for autumn. Visitors received a EUR 12 reduction per person per night for stays of two to seven nights. The spring phase of the scheme generated more than 66 000 overnight stays, providing significant support to local tourism businesses and helping to revitalise the region's visitor economy.

Greece: A climate crisis resilience fee is imposed per overnight stay and replaces the former Accommodation Tax. The revenue generated from the fee is allocated to a dedicated emergency fund for the prevention and restoration of natural disasters, as well as for improving infrastructure to support the country's tourism product.

Italy: In 2023, the Emilia-Romagna region of Italy experienced devastating flooding resulting in the loss of 17 lives and an economic impact estimated at EUR 8.8 billion. In response, the Ministry of Tourism allocated EUR 10 million to support the recovery of affected businesses. Immediate steps included establishing payment procedures to expedite financial relief and launching dedicated promotional campaigns to sustain tourism interest in Emilia-Romagna. This quick mobilisation aimed to minimise economic fallout and bolster business continuity in the sector.

Poland: As reaction to severe floods in September 2024, the Polish government developed a separate law providing a one-off allowance for micro and small enterprises to support the continuation of economic activities after suffering loss, damage or destruction as a direct result of flooding, funded by the Tourism Aid Fund (TAF). In addition, the Tourism Infrastructure Reconstruction Programme was launched under the Physical Culture Development Fund with a budget of PLN 70 million in response to the urgent need to restore the functionality of tourist facilities in affected areas. Funding was provided for investments into the reconstruction or renovation of existing tourist facilities and accompanying infrastructure that were damaged or destroyed by natural disasters.

Capacity building and education to enhance resilience

Tourism policy and decision makers require timely, context-specific and localised impact assessments to inform planning and investment strategies. Building adaptation and resilience literacy across tourism stakeholders is fundamental in this regard (OECD, 2022[33]) as it empowers decision makers to assess potential risks at their destination and develop practical actions and adaptation strategies for their businesses. Participatory approaches, such as the development and dissemination of regional hazard maps, enable collaborative understanding of potential risks and foster locally tailored solutions. Additionally, enhancing research into effective, evidence-based, and cost-efficient adaptation options is important to guide investments and prioritise interventions (Steiger et al., 2024[11]).

Many tourism businesses, especially SMEs, lack the resources and technical expertise necessary to respond effectively to the risks posed by extreme weather-related events. Tailored training initiatives can help these businesses understand the specific threats posed by changing weather conditions and extreme weather-related events, assess their vulnerabilities, and implement adaptive measures. Such efforts not only strengthen individual tourism enterprises but also contribute to the overall resilience of destinations and the tourism sector more broadly (Gössling and Reinhold, 2025[35]). Tourists themselves play a role in this adaptive landscape and should be informed about the potential risks associated with weather events, in ways that are accurate and timely. Clear communication helps travellers make informed choices while avoiding unnecessary alarm, thereby fostering responsible and supportive behaviours (Wright, Rutty and Scott, 2024[37]).

Capacity building should go beyond individual initiatives to include sector-wide efforts to upskill tourism workers in weather-related risk management (Box 4.5). Strengthening the understanding of changing weather and weather-related events and adaptation tools among tourism stakeholders can also help to ensure that managers, employees, and policymakers are working from a shared evidence base and common set of practices (Becken and Loehr, 2024[27]). These initiatives help integrate weather-related risk considerations into everyday operations, from destination planning to supply chain management. An example for capacity building is a promotional project in Poland on Cooperation-Innovation-Sustainable Tourism in 2023-2024. The project addressed the topics of promotion, awareness raising and diagnosis of the state of sustainable tourism in Polish regions.

Box 4.5. Capacity building to enhance tourism sector resilience – selected country examples

Australia: The National Sustainability Framework for the Visitor Economy provides a nationally agreed understanding of sustainable tourism. It was released in November 2023 and was developed in partnership with all Australian states and territories. The Framework outlines 4 pillars of sustainable tourism: i) taking a managed approach to sustainability; ii) implementing environmental and climate action; iii) respecting culture; iv) creating positive social impact. It is accompanied by a Sustainable Tourism Toolkit which contains practical, easy-to-understand guidance across the four pillars of sustainable tourism to assist tourism businesses on their sustainability journey.

Croatia: The Ministry of Tourism and Sport conducts workshops to raise awareness and educate tourism stakeholders to improve the resilience of the community and infrastructure, as well as the health and quality of life of people. More than 700 stakeholders have participated in a series of five workshops held annually.

Japan: In response to the major earthquake in the Kumamoto Prefecture in 2016, the prefecture created manuals on evacuation to help international guests return home and conducted drills responding to natural disasters, with the participation of international travellers. In Okinawa, with many remote islands scattered across the region, local authorities hold regular seminars and training sessions on tourism crisis management.

Indonesia: A centralised platform (Sisparnas) provides education material on crisis management and real-time weather information relevant to tourism destinations.

Saudi Arabia: In 2021, the Sustainable Tourism Global Centre was established. The Centre offers standardised climate impact metrics and digital toolkits to build capacity for climate-resilient tourism businesses. For 2026, a heat vulnerability index is planned for key destinations.

Consumer-facing and educational actions are also essential for creating a shared culture of resilience. Public awareness campaigns can highlight the risks posed by extreme weather and promote responsible travel choices, while educational initiatives can help visitors understand local vulnerabilities and appreciate the measures destinations are taking to address them. Encouraging low-impact travel modes and the selection of destinations that actively engage in sustainable practices helps travellers become active participants in the transition to a more environmentally sustainable and resilient tourism future.

Adaptive business operations and demand management

Adaptive business operations and demand management are becoming key components of the tourism sector's ability to withstand and recover from weather-related disruptions. As the frequency and severity of extreme weather events continue to rise, tourism businesses and destinations must adjust their operational strategies while building resilience into their planning and communication. These measures are not only reactive responses to immediate crises but also part of a broader effort to foster sustainable, long-term adaptation within the sector.

As part of this effort, tourism enterprises are increasingly relying on short-term operational adjustments to protect their assets, staff, and customers while ensuring the continuity of services. Transparent and real-time communication about risks is central to these adjustments, and to help maintain visitor confidence and avoid the erosion of trust that can accompany uncertainty. In the aftermath of disasters including those caused by extreme weather-related events, strategic destination marketing plays an important role in rebuilding a location’s image and attracting travellers back. For example, in Poland PLN 2 million was allocated to promotional activities supporting the recovery of the tourism sector after severe floods in 2024. In western Canada, devastating wildfires in 2023 and 2024 triggered global media coverage that portrayed the country as “engulfed in flames”, harming its tourism brand. Destination Canada has supported the sector following the wildfires by working to enhance Canada’s brand and demonstrating to international markets the reality of regional safety (Destination Canada, 2025[38]). Campaigns that emphasise resilience and recovery can counteract negative perceptions, while targeted advertising can highlight renewed safety and appeal of destinations. To ensure that these efforts are effective, crisis management and customer care training for tourism staff can help businesses to respond swiftly and compassionately during high-stress periods.

Examples of adaptive business operations can be found in Australia and New Zealand, where tour operators facing wildfires and floods often close temporarily or adjust itineraries to travel in safer areas, with some operators now integrating risk data into their seasonal planning to better anticipate disruptions. Following catastrophic wildfires in Canberra, Australia, the “Heart Recovery Campaign” effectively repositioned the city as a safe and welcoming destination. By combining messaging about resilience with targeted promotional efforts, the campaign helped restore visitor confidence and catalyse tourism recovery (Armstrong and Ritchie, 2008[39]). While around the world, mountain destinations are adapting to warming winters and reduced snow cover by diversifying activities, investing in snow-making technologies and modifying their operating calendars, ensuring that ski resorts can maintain viable operations despite changing seasonal conditions (Steiger et al., 2024[11]).

Managing tourist behaviour and demand is another dimension of adaptation. Weather-related disruptions often alter visitor flows, requiring destinations to closely monitor travel patterns in response to weather alerts and environmental hazards. Flexible booking, cancellation, and refund policies are becoming increasingly important to build and maintain customer trust under increasingly changeable and even volatile conditions. Meanwhile, destinations and operators can mitigate risks by temporarily re-routing or redesigning tourist experiences – for instance, shifting activities from outdoor to indoor attractions during periods of extreme weather. Such measures preserve the visitor experience while safeguarding well-being. One such example is the *Refúgiate en la cultura* (Take refuge in culture) initiative in Madrid, Spain, where cultural attractions such as museums were promoted as heat refuges. Free flamenco performances in major museums accompanied that initiative (Madrid Destino, 2025[40]). Studies show that although extreme events like floods or heatwaves can temporarily damage a destination’s image, tourists often demonstrate resilience, with many choosing to return once safety and quality of the tourism product are assured. This underscores the need for destinations to focus on expectation management and visitor experience rather than assuming long-term declines in demand (León-Cruz, Neger and Gössling, 2025[19]).

Community-based adaptation provides an additional and often complementary approach to managing weather-related risks. By drawing on local and Indigenous knowledge, destinations can develop strategies that are both culturally grounded and ecologically sustainable. In New Zealand, the principle of *kaitiakitanga* (Māori environmental guardianship), is increasingly integrated into tourism planning, ensuring that adaptation efforts reflect Indigenous stewardship values and prioritise the long-term health of ecosystems (Higham et al., 2024[23]). Local tourism enterprises are also taking proactive steps by creating flexible products, shifting to alternative or seasonal offerings when conditions demand, and participating directly in conservation initiatives that sustain the natural landscapes central to their operations (Navarro-Drazich et al., 2024[41]). These locally driven actions not only build resilience within individual businesses but also enhance the adaptive capacity of destinations and the sector more broadly.

Taken together, these operational, behavioural, and community-based strategies highlight the evolving nature of tourism adaptation. Resilience is no longer limited to infrastructure or crisis response; it encompasses how businesses communicate with travellers, how destinations manage visitor flows, and how communities themselves shape the future of tourism in harmony with their environments. By combining agile business practices, proactive demand management, and destination-based adaptation measures, the sector can not only withstand the impacts of extreme weather-related events but also foster more sustainable forms of tourism that will continue to support local communities into the future.

Policy considerations to prepare tourism for extreme weather-related events

While there is a growing body of practice that demonstrates how destinations are taking steps to absorb shocks, protect livelihoods, and maintain tourism flows, tourism remains vulnerable to extreme weather-related events. Major gaps in preparedness remain, especially in regions with limited governance capacity or funding (Becken and Scott, 2024[34]; Scott, 2024[42]), with enhanced cross-sector collaboration, local empowerment, and systematic monitoring key to moving from reactive to proactive adaptation.

Effective preparation and adaptation in tourism requires a mix of technological, institutional, ecological, and behavioural measures. Good practices show that preparation and adaptation is most effective when it is locally grounded, participatory, and supported by multi-level governance and adequate finance. Yet, major gaps remain in integration with national policies and in data availability to track progress (Becken and Scott, 2024[34]; Scott, 2024[42]).

A whole-of-government approach in close co-operation with tourism sector is needed for countries and destinations to prepare, respond and adapt to extreme weather-related impacts. A selection of policy considerations to help build resilient and sustainable destinations are outlined below:

- **Risk assessment, early warning and emergency response form the backbone of strategies designed to protect tourism destinations from the growing threat of extreme weather-related risks**. For example, undertaking systematic risk scans of destinations can provide policymakers with the necessary information to prioritise investments to enhance resilience and strengthen the capacity of destinations to transform and adapt. Similarly, taking steps to ensure that emergency and early-warning systems are robust and paired with effective communication channels can help to effectively warn and protect residents and visitors during extreme weather events (e.g. multilingual alerts, mobile apps, real-time weather info). Integrating crisis management protocols tailored to tourism-intense, high-risk zones with national emergency response frameworks can help to ensure rapid and co-ordinated responses when disasters strike and minimise any loss of life and economic disruption.
- **Governance, planning, and policy integration for adaptation to extreme weather-related events require a comprehensive, multi-level approach**, focusing on immediate risk reduction and building long-term resilience across destinations. This includes, for example, taking steps to strengthen institutional co-ordination and mainstream adaptation within national and regional policies, and developing robust planning frameworks that respond to both current and projected changes to weather and extreme events. It is also important to work closely with tourism related ministries to ensure that tourism is integrated into national adaptation strategies and maximise opportunities for the sector to benefit from broader resilience initiatives.
- **Upgrading tourism infrastructure to withstand extreme weather is increasingly important to secure the long-term resilience of the sector**. Many tourism hotspots are located in highly

exposed geographic locations, and as such the need to upgrade tourism infrastructure to withstand extreme weather is becoming more important to secure the long-term resilience of the sector. In response, tourism policymakers need the capacity to work with relevant authorities to strengthen regulatory frameworks, where appropriate, including the enforcement of building codes, zoning laws, and infrastructure standards designed to reduce vulnerability to weather-related hazards. Policymakers should also consider potential mechanisms to encourage business investment in resilient infrastructure (e.g. flood-proof systems, and renewable energy technologies), including financial incentives and public-private insurance programmes.

- **Taking steps to address rising costs associated with infrastructure maintenance, insurance and the implementation of extreme weather adaptation strategies can help to reduce pressure on the financial sustainability of tourism businesses**. Many tourism businesses, and particularly SMEs, lack the capacity for necessary investments in resilience, leaving them more vulnerable to future hazards. Supporting these businesses requires a combination of affordable entry points and progressive investment pathways, enabling them to strengthen resilience while maintaining competitiveness in a rapidly changing market. Examples of financial and economic instruments include subsidies or tax incentives for resilient infrastructure and working to facilitate access to insurance pools, to which tourism businesses can contribute to enhance resilience and reduce insurance costs. In addition, public–private co-financing for protective infrastructure can provide a potential pathway for scaling adaptation by pooling resources for infrastructure investments. For example, flood defences, resilient transportation networks, or renewable energy grids can protect and benefit multiple stakeholders within a destination.
- **Adaptive business operations and demand management are key components of the tourism sector's ability to withstand and recover from weather-related disruptions**. Building adaptation and resilience literacy across tourism stakeholders empowers decision makers to assess the risks of extreme weather-related events at their destination and prioritise actions and adaptation strategies for their businesses. Examples of support include providing businesses with training and capacity building to enable them to better understand potential threats, assess vulnerabilities and implement preventive and adaptive measures – including demand management options such as flexible booking, cancellation and refund policies, as well as temporarily re-routing or redesigning tourist experiences. In addition, enhancing and sharing research into effective, evidence-based, and cost-efficient adaptation options can guide investments and prioritise interventions.
- Finally, **entrepreneurs and businesses are on the frontline of impacts from the impacts of extreme weather-related events**. As such, they will need to take steps to build flexibility and resilience directly into their operations and develop the capacity to adapt in real time when conditions become unsafe. National and sub-national governments and DMOs will have an important role to play in incentivising and facilitating business and destination efforts to prepare for the increasing frequency of such events. This will include retrofitting existing infrastructure to enhance business resilience, diversifying tourism products and services, training staff to manage crises and keep visitors informed about risks, and developing safety measures and contingency plans to apply during disruptive events. A particular challenge for governments will be to ensure that small operators and less-resourced destinations are not left behind and have the necessary resources to implement effective systems to enhance their resilience and prepare for adaptation to extreme weather-related events.

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Note

[1] (Co-)reinsurance or retrocession – A reinsurance arrangement for reinsurers

Part I OECD country profiles

Australia

Australia: Key tourism messages 2026

Tourism direct GDP (2024-25)	Tourism direct employment (2024-25)	Travel exports[1] (2024-25)
2.9% of total GDP (equal to share in 2023-24)	4.4% of total employment (equal to levels in 2023-24)	62.1% of total service exports (up 1.9 percentage points since 2023)

1. International education costs, classified as 'Education-related personal travel' are included in 'Travel' figures by the Australian Bureau of Statistics. Education-related personal travel accounts for approximately two thirds of travel reported exports.

National tourism strategy: THRIVE 2030 Strategy

Responsible government agency: Policy: The Australian Trade and Investment Commission (Austrade); Promotion: Tourism Australia

National tourism budget: AUD 171.1 million (promotion) (2025-26)

Key tourism policy priorities and actions:

- *Deliver success through comprehensive collaboration* – Addressing complex policy issues by establishing working groups, including the First Nations Visitor Economy Partnership, which was developed through a co-design process with First Nations tourism industry representatives.
- *Improve data and insights* – Modernising and improving tourism data to produce relevant, robust and timely insights by taking advantage of new data sources and launching the Longitudinal Indicators for the Visitor Economy (LIVE) Framework dashboard to monitor sustainable growth.
- *Build markets and attract visitors* - Attracting high-value visitors through co-ordinated, innovative and personalised visitor attraction strategies that target a mix of domestic and international markets to increase visitor spend and support regional dispersal and a diversified market share.

Tourism in the economy and outlook

Tourism remains an important pillar of the Australian economy. In the 2024-25 financial year, tourism accounted for 2.9% of total GDP or AUD 81.1 billion, a 3.8% increase on 2023-24 in nominal terms. During the same time period, tourism contributed 696 000 jobs or 4.4% of total employment, a 2.0% increase.

In 2024, Australia recorded 8.3 million international visitor arrivals, a 15.1% increase on 2023 but still below 2019 record numbers (9.5 million arrivals). This trend continued in 2025 with an 8.1% increase in arrivals on 2024 (still 5.6% below 2019). Spending by international tourists reached AUD 42.3 billion in 2024, with a record 295.0 million nights. Australia's top international tourist markets were New Zealand (16.8%), China (10.8%) and the United States (8.6%). Australia forecasts continued growth through to 2030, targeting 10.9 million international arrivals.

Domestic overnight trips reached 112.8 million in 2024, slightly below 2023 levels (0.3%). Domestic overnight trips are forecast to reach 123 million by 2030.

Tourism governance

The Australian Trade and Investment Commission (Austrade) is the federal government agency responsible for tourism policy, programmes, and research. Tourism policy, data and research is undertaken by the Office of Tourism and the Visitor Economy within Austrade. Tourism Research Australia, which forms part of the Office of Tourism and the Visitor Economy, provides international and domestic tourism data, statistics, and analysis.

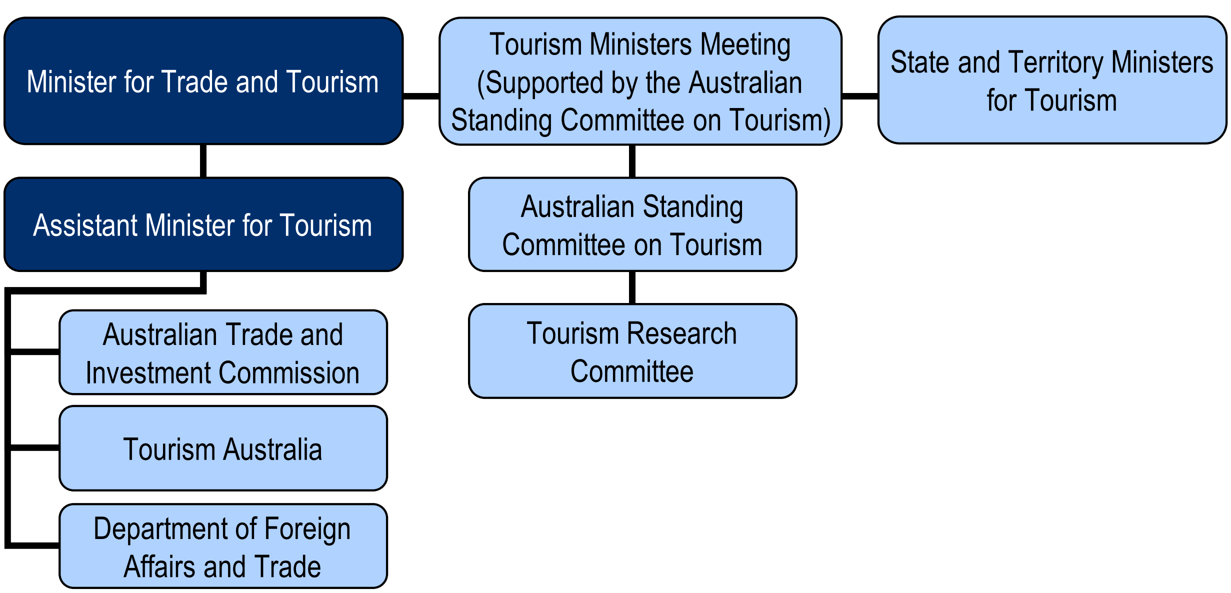
Tourism Australia is the government agency responsible for international tourism marketing and promotion. Tourism Australia works closely with Australia's state and territory tourism organisations and with key partners to market Australia as a holiday destination to international audiences and to support the Australian tourism sector.

Austrade works with the Department of Foreign Affairs and Trade to strengthen bilateral tourism relationships and engage in multilateral fora including the APEC Tourism Working Group, G20 Tourism Working Group and OECD Tourism Committee. All state and territory governments in Australia incorporate tourism into their portfolios to ensure effective international and domestic tourism promotion and sector development. The Tourism Ministers' Meetings (TMM) bring together tourism ministers from the federal, state and territory governments to discuss tourism policy matters of mutual interest. This work is supported by the Australian Standing Committee on Tourism (ASCOT), which is chaired by Austrade and includes representatives from Tourism Australia, state and territory tourism organisations, and relevant state departments with responsibility for tourism policy. Representatives from the tourism sector and other relevant federal and state departments can also be invited to attend ASCOT and TMM meetings, as necessary.

The Visitor Economy Industry Stakeholder Forum is a regular event chaired by Austrade, designed to foster collaboration and information sharing between government partners and leaders from across Australia's tourism and travel sectors.

The Portfolio Additional Estimates Statements includes AUD 171.1 million in 2025-26 for Tourism Australia to promote Australia as a destination for leisure and business events travel.

Australia: Organisational chart of tourism bodies



Source: OECD, adapted from the Australian Government, 2026.

Tourism policies and programmes

THRIVE 2030 is Australia's national strategy for the long-term sustainable growth of the visitor economy. The vision is that Australia's visitor economy provides world-leading services and visitor experiences to consumers while delivering significant and sustainable benefits to the Australian community. This will be accomplished by collaborating with stakeholders to achieve success, modernising supply side enablers and diversifying markets, experiences and destinations.

The Strategy is complemented by specific tourism frameworks. For example:

- The 'National Sustainability Framework for the Visitor Economy' is the nationally agreed understanding of sustainable tourism developed in partnership with all Australian states and territories. The Framework is accompanied by a Sustainable Tourism Toolkit which contains practical, easy-to-understand guidance across the four pillars of sustainable tourism to assist tourism businesses on their sustainability journey.
- The 'WELCOME Framework' provides guidance to make tourism more accessible to all travellers. It has simple, practical tips to help tourism operators to become more accessible and inclusive, helping them to reduce barriers to participation and to start their accessible tourism journey.
- The First Nations Visitor Economy Partnership was established in March 2025 through a co-design process with First Nations tourism industry representatives. The Partnership supports greater participation and economic opportunities for First Nations people and businesses in the tourism industry and will investigate the establishment of a permanent national First Nations tourism body. It demonstrates the continued priority to deliver success through comprehensive collaboration, that started with the establishment of technical working groups for workforce and data under the THRIVE 2030 Strategy first action plan.

Strengthening the tourism workforce remains a priority for Australia. Workforce issues are addressed through an Australian Government Employment White Paper for a dynamic and inclusive labour market that provides opportunity for secure, fairly paid work for all. A Migration Strategy outlines reform directions for a migration system that matches the needs of the nation and delivers for Australia and migrants (both released in 2023). Sector specific programmes include the 'Choose Tourism' programme to attract people to work in tourism across 2022-24 (AUD 8.1 million) targeted at underrepresented cohorts, in addition to a communications campaign to encourage employers to consider employing a diverse and inclusive workforce. The Tourism Local Navigator Pilot (2023-24) supported small tourism businesses to employ people with a disability. The pilot engaged around 1 600 businesses and delivered up to 163 employment outcomes.

Accommodation Australia, an industry body, was provided funding to develop an online employment, skills and training portal (named 'eeger') for the tourism industry. The platform, launched in July 2025, aims to address the challenges of workforce development, skills shortages and career growth by connecting jobseekers and employers and promoting career pathways in the visitor economy.

An ongoing commitment to improving tourism data culminated in the introduction of Domestic Tourism Statistics (DoTS) from 1 January 2025 to replace the National Visitor Survey. DoTS combines survey data with mobile network operator data to measure domestic tourism. The Longitudinal Indicators for the Visitor Economy (LIVE) Framework data dashboard was launched in November 2024, collating 21 indicators that provide a more comprehensive assessment of sustainable growth across economic, social, environmental and institutional dimensions (see box below). New reports and publications have also been developed on key tourism areas including accessible tourism, agritourism, and cycle tourism.

Key initiatives being implemented in collaboration with the private sector include:

- The Australian Tourism Industry Council's Quality Tourism Framework, incorporating accreditation programmes, short online courses and the national tourism awards, has been updated to build tourism business capability, funded via an AUD 8 million grant.
- Ecotourism Australia's 'Strive 4 Sustainability Scorecard' and the Australian Tourism Export Council's 'Tourism Trade Ready' programmes were delivered to build business capability.

A series of webinars supported tourism industry associations to collaborate and share experiences working with the insurance industry, to improve insurance affordability and accessibility for members.

Measuring sustainability using a data-driven model in Australia

Australia's Longitudinal Indicators for Visitor Economy (LIVE) Framework and Dashboard is a data initiative designed to measure the health and performance of the visitor economy across four key dimensions: Economic, Social, Environmental, and Institutional. LIVE was developed through a collaborative process including representatives from national government, states and territories, the tourism sector and academia. The Framework was a key recommendation from the Industry Data and Expert Analysis (IDEA) Working Group, established to identify unmet information needs and make recommendations for improving data and insights.

The LIVE Framework was developed to provide more comprehensive and timely data to measure sustainable growth of the visitor economy and is designed to enable more effective measurement of industry performance, informed decision making, monitoring of trends, and input into policy development.

The IDEA Working Group reviewed over 80 indicators from diverse sources to determine the final 20 that are included in the dashboard, enabling users to explore trends at national, state, and local levels. This Framework combines various data sources, including survey data, mobility data and more, to provide a holistic view of the visitor economy. Some of the core indicators included are:

- Economic: Economic value of tourism, tourism jobs, investment in tourism, visitor economy expenditure, average spend per night, business events expenditure, international visitor concentration, inbound vs outbound visitation, airline capacity
- Social: International visitor sentiment, tourism accessibility, First Nations engagement, international first-time visitation, regional vs capital city visitation, domestic visitor density, international desirability
- Environmental: Tourism related greenhouse gas emissions, international sustainable destination ranking, state and national park visitation
- Institutional: Tourism related digital capability, tourism related innovation.

The framework is embedded in Austrade's THRIVE 2030 Strategy and supports policy priorities including improving data and insights, enhancing regional development, and fostering sustainable tourism. The LIVE dashboard will have ongoing work to consider additional indicators for inclusion in the dashboard along with other enhancements to support interpretation and understanding.

Australia - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/9xp7sj

Austria

Austria: Key tourism messages 2026

Tourism direct GDP (2025)	Tourism direct employment (2024)	Travel exports (2025)
4.4% of total GDP (preliminary data) (equal to share in 2024)	4.3% of total employment (up 0.2 percentage points since 2023)	27.7% of total service exports (preliminary data) (up 0.5 percentage points since 2024)

National tourism strategy: Vision T

National tourism administration: Ministry of Economy, Energy and Tourism

National tourism budget: EUR 68.4 million (2025)

Key tourism policy priorities and actions:

- *Fostering balanced tourism development 365 days a year* – Raising awareness for and taking steps to develop a sustainably successful tourism industry with high acceptance within the population, guided by sustainability indicators.
- *Strengthening resilience of tourism SMEs* – Supporting SMEs to become more sustainable and facilitating succession processes for the next generation of business operators.
- *Promoting Austria as a sustainable tourism destination* – Focusing on innovation, diversification of markets and year-round tourism.

Tourism in the economy and outlook

Tourism is an important driver of the Austrian economy. The sector is estimated to have directly contributed EUR 23 billion in 2025, up 5% since 2024, or 4.4% of total GDP. Tourism is also a key employer in Austria, with the sector directly contributing 177 000 jobs (full-time equivalents) in 2024, accounting for 4.3% of total employment in the country, up by 0.2 percentage points from 2023. International travel receipts reached EUR 25.9 billion in 2025, or 27.7% of total service exports, a 6.6% increase compared to 2024 (EUR 24.3 billion).

The number of international tourist arrivals recorded in all accommodation establishments (commercial and private) reached a record 33.5 million in 2025, 4.1% higher than 2024 levels. Germany remains the top international source market, accounting for 46% of inbound arrivals at accommodation establishments, followed by the Netherlands (7%) and Switzerland (incl. Liechtenstein) (4%).

Domestic tourist arrivals in paid accommodation totalled 14.7 million in 2025, up 1.0% compared to 2024, with 40.5 million bednights registered (0.5% higher than 2024).

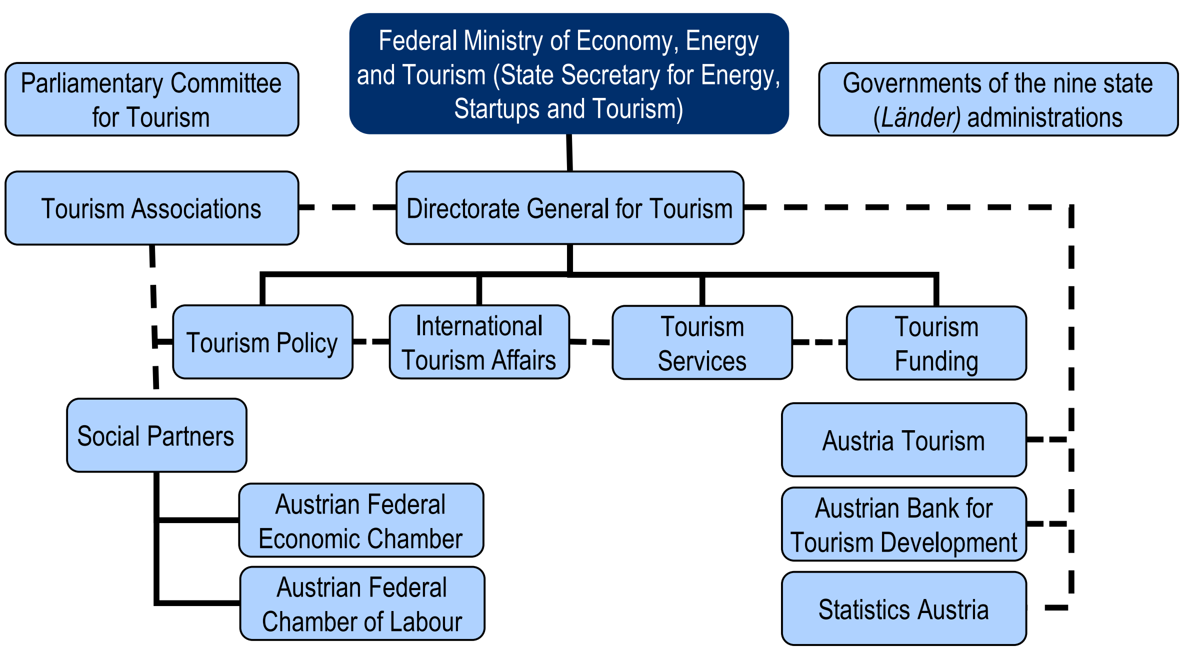
Tourism governance

At the national level, the Federal Ministry of Economy, Energy and Tourism is responsible for tourism policy, which is overseen by a Parliamentary Committee for Tourism. Legislative and executive responsibility for tourism affairs resides with the nine federal states (*Länder*). Co-ordination between the Ministry and the federal states is supported through a Steering Group for Tourism. The Ministry works with other ministries, departments, institutions, and the private sector on specific topics (e.g. new funding schemes, new legislation affecting tourism) either via permanent groups, round tables or on a case-by-case basis.

Austria Tourism, the national tourism organisation, is responsible for market research, brand management, marketing, tourism networking, innovation, and information provision. The Austrian Bank for Tourism Development is a specialised tourism bank acting in a public-private partnership with the Ministry. Statistics Austria collects and disseminates tourism data.

The national tourism administration had a total budget of EUR 68.4 million in 2025. Of this, EUR 29.2 million was dedicated to financial support for SMEs administered by Austrian Bank for Tourism Development with a further EUR 32.6 million allocated to Austria Tourism. The Ministry disbursed EUR 4.7 million through individual subsidies for co-financed tourism projects and service contracts. In addition, SMEs in the tourism sector received EUR 58 million from the European Recovery Programme. In addition to the national budget, all nine federal states have tourism budgets to support specific tourism development programmes.

Austria: Organisational chart of tourism bodies



Source: OECD, adapted from the Federal Ministry of Economy, Energy and Tourism, 2026.

Tourism policies and programmes

Austria's national tourism strategy "Vision T" was published mid-2026. It is the result of a collaborative process that began with a broad survey of people working in the tourism sector, Austrian residents, tourists and enterprises. This was followed by expert and stakeholder workshops. The Strategy's focus is on a tourism sector that creates value 365 days a year – for businesses, employees, regions, visitors and locals alike. Vision T's compass of strategic values is oriented towards creating, appreciating and preserving value and addresses five fields of action: economic strength and resilience, labour market and skilled workers, innovation and digitalisation, resources and responsibility, added value and participation. To measure its success, specific targets along nine indicators will be used: real added value through tourism, international travel receipts, equity ratio of quality hotels, tourism acceptance score, year-round employees in accommodation and gastronomy, guest satisfaction, share of tourist nights outside the top four months, number of Austrian Eco-labels for tourism businesses, CO2-emissions in accommodation and gastronomy.

Recent key achievements of national tourism policy include a new strategic approach for Austria Tourism, new funding guidelines for tourism SMEs with a focus on resilience and sustainability and continuous development of a set of tourism indicators to measure success across all dimensions of sustainability including tourism acceptance. Other achievements include a new strategic approach to certification, and an increasing number of businesses and destinations awarded the Austrian Ecolabel, as well as the implementation of the regional RESY-Dashboard, which includes data on the municipal level for various (tourism) indicators, as well as the Austrian National Tourism Data Space. The nine federal states also have their own individual tourism strategies.

Balanced tourism and tourism acceptance remain key priorities for Austria, with several initiatives at the national level. Austria created the guide "Find the Right Balance" to support regional decision makers in dealing with imbalances in tourism. The guide was accompanied by a funding call to develop tailor-made concepts to address the challenges of impacted regions. Seventeen selected projects seek to enhance tourism balance through, for example, the use of mobile phone data, weather data and AI for visitor flow management, sustainable modes of transport and instruments to measure the sustainable development of tourism destinations, as well as organising participatory processes.

The new Austrian Ecolabel for Tourism Destinations, introduced in 2022, remains a key initiative to encourage tourism destinations to accelerate the green transition, improve regional value chains and respond to the increased demand for sustainable holidays. Aimed at regional tourism destinations, it requires close co-operation between tourism policymakers, destinations and businesses, as well as sufficient financial and human resources. The label includes 63 mandatory and 56 optional criteria covering management, socio-economic impact, environmental protection, mobility and culture. As of May 2026, 16 Austrian destinations had been awarded the Ecolabel for Tourism Destinations.

To promote the need for sustainable tourism, a dialogue series was introduced in 2023. This dialogue has covered key topics of sustainability certification, energy efficiency, future of winter tourism, culinary art, the Regional Information and Monitoring dashboard RESY, digital accessibility, succession processes for SMEs and balanced tourism. An annual Sustainable Tourism in Austria Summit (STiAS) was introduced in 2024 as a partnership between Austria Tourism and the Ministry.

A new funding scheme to support succession processes for tourism SMEs was launched in June 2025 to provide opportunities to build resilience in tourism businesses. The scheme aims to create business plans addressing the strengths, weaknesses, opportunities and threats of a recent or impending succession process. The goal is to prevent small, often family led hotels and restaurants in rural regions from closing when the current owner or operator retires. This subsidy aims to make it more attractive for potential successors - often the children of the current owners - to carry on with the business. Guidance for succession processes is provided through brochures, magazines and dedicated websites.

A national Tourism Data Space was developed to support the digital transition, innovation and value creation by facilitating secure and efficient data sharing across the tourism value chain and related sectors such as energy, mobility, culture, construction, and agriculture, both nationally and internationally. It was established through a Memorandum of Understanding between Austria Tourism, the Data Intelligence Offensive, MODUL University, Standortagentur Tirol and Tirol Werbung, and is planned to be integrated into the European Tourism Data Space once it becomes operational. Several use cases have been developed, including visitor management, tourism infrastructure and AI, with a long-term objective to create data and app marketplaces, allowing interested parties to work with tourism data and develop new applications and products. Tourism SMEs can also benefit from the KMU.DIGITAL programme, a whole of economy programme providing advice on business model, resource optimisation, e-commerce and online marketing, IT and cybersecurity, as well as digital administration.

To address labour shortages in the tourism sector, Austria launched an online platform and social media campaign under the title “Team Tourism – strong branch, your chance!” in 2023. The ongoing campaign aims to strengthen the image and attractiveness of the sector and to demonstrate the versatility of tourism as an employer, specifically for young people. Other initiatives to address labour shortages include:

- Incrementally increasing the yearly contingency for seasonal workers in tourism from 1 000 to 2 989 in 2022; 3 398 in 2023; 4 495 in 2024; and 8 000 in 2025.
- Loosening criteria for core seasonal workers, allowing some long-standing seasonal workers to receive permanent access to the labour market (red-white-red-card for core seasonal workers).
- Enabling skilled workers from third countries to work in professions with a declared lack of skilled workers (e.g. waiter, restaurant chef).
- Qualification and support measures for staff.

Measuring tourism acceptance of local populations in Austria

Tourism acceptance in Austria was surveyed by an external market research institute as part of a pilot project from 2020 to 2023, which demonstrated the importance of measuring and continuously monitoring tourism acceptance in order to recognise trends and changes in the perception of tourism at an early stage and to react to them in a targeted manner by evidence-based tourism policy.

In 2024, the survey methodology was simplified and integrated into the existing Tourism Demand Statistics carried out by Statistics Austria, alongside the survey on the travel behaviour of the Austrian population. This integration legally secures the annual survey, ensures continuous monitoring of tourism acceptance, and allows significantly more people to be surveyed (13 000 interviews in 2025).

The new Tourism Acceptance Score (TAS), developed from the survey, shows the difference between positive and negative perceptions. In 2025, the key figure was clearly positive at +37 percentage points, with a positive TAS meaning the proportion of the population with a positive attitude outweighs that with a negative association. “Neutral” and “don't know” responses are not taken into account in the calculation of the TAS, but are important when interpreting the TAS as they have a significant influence on the possible level of the TAS.

The survey also asks for the importance of tourism for one’s own professional and financial situation, as well as the perceived volume of tourists at one’s own place of residence and for Austria as a whole. For example, 71% of respondents consider tourism to be very important for Austria's economy, labour market, and leisure activities, while 48% indicated that there is the right number of tourists in the country.

Austria - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/cu02gb

Belgium

Belgium: Key tourism messages 2026

Tourism direct GDP (2022)	Tourism direct employment (2022)	Travel exports (2024)
1.5% of total GDP (down 0.2 percentage points since 2019)	7.4% of total employment (up 0.15 percentage points since 2019)	6.2% of total service exports (down 0.3 percentage points since 2023)

National tourism strategy: Flanders: Policy Note 2024-2029 | Wallonia: Tourism Strategy 2030

Responsible government agency: Flanders: VisitFlanders | Wallonia: Tourism Wallonia

National tourism budget: Flanders**:** EUR 75 million (2026) | Wallonia: EUR 65 million (2026)

Key tourism policy priorities and actions:

- *Implementing a long-term, integrated tourism strategy* – Working to implement the Tourism Strategy 2030 which aims to develop sustainable and competitive tourism, that focuses on quality, innovation, and international positioning (Wallonia).
- *Transition to sustainable tourism models* – Implementing the Walloon Sustainable Development Strategy and the reform of the Walloon Tourism Code and introducing the "Tourism for All" charter to ensure social inclusion and accessibility (Wallonia).
- *Fostering sustainable tourism development that creates social added value* – Enabling Flanders to flourish as an innovative, and high-quality travel destination for the benefit of its residents, entrepreneurs, and visitors under the 'Tourism to Tomorrow' vision (Flanders).

Tourism in the economy and outlook

In Belgium, tourism is under the respective authority of three regions: Flanders, Wallonia, and Brussels. This section provides a national overview of the impact of tourism in the country, followed by detail of the respective governance and policy initiatives of the Flanders and Wallonia regions. Travel exports represented 6.2% of total service exports in 2024.

In 2024, Belgium received 6.6 million international tourists in hotel accommodation, who spent a total of 12.6 million nights in hotels and similar establishments. Of this figure, 3.2 million visited Flanders (an increase of 3% from 2023), 2.6 million visited Brussels (an increase of 4% from 2023) and 819 thousand visited Wallonia (a decrease of 3% from 2023). The top three source markets in 2024 were the Netherlands (18%), France (15%) and Germany (11%). In 2025, arrivals grew by an 3.1%.

Based on a travel survey, Belgium estimates that 5.7 million domestic overnight trips were taken in 2024 in all types of accommodation. This figure is 2.3% below 2023 levels.

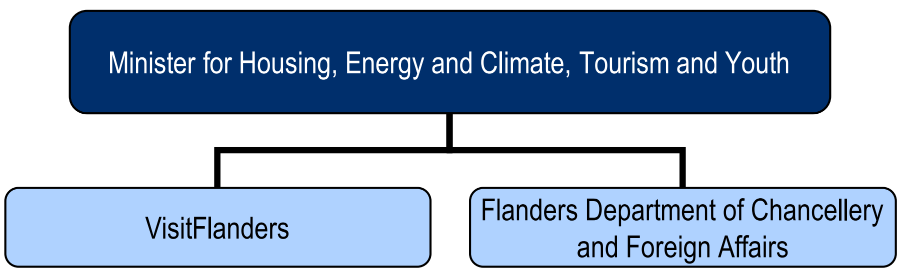
Flanders region

Tourism governance

In Flanders, tourism is the responsibility of the Vice-Minister-President of the Flemish Government and Flemish Minister for Housing, Energy and Climate, Tourism and Youth. The Tourism Unit of the Flanders Department of Chancellery and Foreign Affairs is responsible for international tourism policy and relations. Visit Flanders is responsible for the sustainable development and promotion of Flanders as a tourist destination.

The overall public sector budget allocated to tourism remains stable at around EUR 75 million in 2026.

Flanders: Organisational chart of tourism bodies



Source: OECD, adapted from the Flanders Department of Chancellery and Foreign Affairs, 2026.

Tourism policies and programmes

Tourism in Flanders is guided by the Policy Note of the Minister for Tourism for 2024-2029. The overall vision is called 'Travel to Tomorrow' and is centred around building flourishing communities, creating balance between the added value for the tourist, the inhabitant, the entrepreneurs and respect for the place itself. The three strategic goals include:

- Making the right to a holiday a reality for every Flemish person
- Developing and promoting thematic experiences with international potential and supporting tourism stakeholders
- Attracting, supporting, and creating impactful events together with partners, EventFlanders.

To make holiday experiences a reality for young people Flanders will introduce a new youth tourism master plan and invest in youth hostels to improve sustainability and quality by creating a new support framework. In 2026, Flanders celebrates 25 years of 'Everyone Deserves a Holiday' with new initiatives to be introduced.

Improving accommodation standards is a key priority for Flanders. To address this the Accommodation Decree will be amended to comply with the EU Short-Term Rental Regulation, with accommodation only recognised as tourist accommodation if it has a planning permit. Further investments will be made to renovate existing tourist accommodation, with all formally recognised accommodation establishments able to apply for financial support to invest in sustainability.

Flanders is being further developed thematically as a destination for international visitors, with areas of focus including the commemoration of World War One, nature and water experiences, and a new Blue Economy experience centre. The coastal vision is being shaped by tourism, and actions are being implemented to support tourism interests, with the aim to make the coast a priority again. VisitFlanders is developing specific promotional campaigns for the various themes and storylines.

Events will remain a core driver for tourism in Flanders. In 2026, EventFlanders will support the organisation of events such as Antwerp Fashion, the opening festival for the Design Museum Gent, and the European 3x3 Basketball Championship. Leuven will also receive support as the European Capital of Culture 2030. EventFlanders also collaborates with event experts to develop top-level events policy via the annual Event Sector Congress and by developing tools and partnerships to inspire and connect the conference and events sector.

Wallonia Region

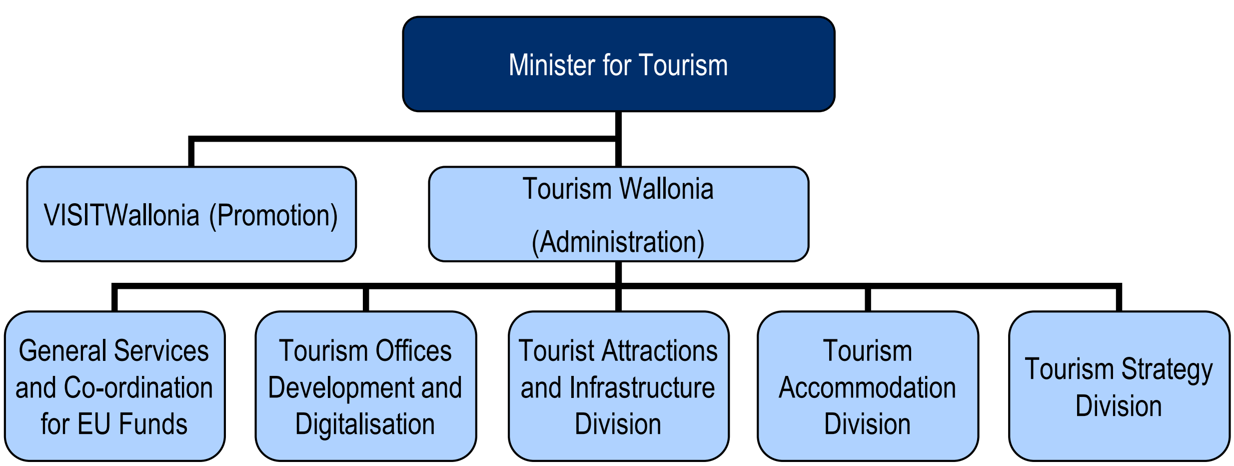
Tourism governance

In Wallonia, tourism is the responsibility of the Minister for Tourism, Heritage, and early Childhood, but also the Vice-President and Minister in charge of Childhood, Youth, Youth Support and Courthouse for the Wallonia-Brussels Federation (French-speaking community). The German-speaking community has made an agreement with Wallonia to manage tourism in its territory. Two main bodies support the Wallonia tourism sector:

- Tourism Wallonia (previously the General Tourism Commission) is the main tourism administration in Wallonia and focuses on developing quality tourism. It provides support to the sector through advice, recognition, labelling and financial aid.
- VISITWallonia (previously Wallonia Belgium Tourism) is responsible for promoting Walloon tourism in Belgium and foreign markets.

The 2026 Walloon budget allocated to tourism is EUR 65 million.

Wallonia: Organisational chart of tourism bodies



Source: OECD, adapted from Tourism Wallonia, 2026.

Tourism policies and programmes

Tourism in Wallonia is guided by the Tourism Strategy 2030, which sets a roadmap for sustainable and competitive tourism, focusing on quality, innovation, and international positioning. Launched in 2022, the overall goals of the Strategy are to increase the economic impact of tourism in Wallonia utilising two primary branding identities, “Authenticity, folklore, culture and heritage” and “Nature and escape”, and by targeting priority customer segments and developing a sustainable, distinctive offer.

Wallonia has developed a Digital Strategy for Tourism that aims to accelerate digital adoption across the sector, including through the creation of a digital transaction platform for operators, ‘My Digital Baggage’. This platform, developed in 2023, is designed to integrate digital tools for marketing, reservations, and customer engagement and will provide a centralised platform for booking, promotion, and co-ordination between operators and tourists. To further promote digitalisation and AI adoption, Wallonia is providing training programs and digital tools to help small operators adopt technology, while facilitating access to e-commerce and online visibility solutions. The My Digital Baggage platform provides a digital maturity diagnostic tool for tourism businesses, quick links to existing tools for capacity building and digital vouchers to help finance participation of businesses (see box below).

Transitioning to sustainable tourism models requires sustainable tourism products, but also the necessary funding, infrastructure and skills to implement and maintain them. Wallonia is working to create and enhance national parks and natural areas while also investing in eco-friendly infrastructure for cycling tourism and nature trails. There is also a focus on adapting public transport to improve access to nature sites and reduce car dependency.

Wallonia is increasingly moving towards more regulated funding mechanisms for sustainable projects, while exploring ways to better co-ordinate sustainability initiatives. For example, professional tourism associations applying for public funding must submit annual action plans using a standardised template that links each action to predefined strategic and operational objectives. Sustainable tourism is explicitly included as an eligible objective, requiring associations to indicate and justify how proposed actions contribute to themes such as sustainability, environmental responsibility, capacity building, network co-ordination or digital transition.

Finally, training programmes are being introduced for operators on eco-responsible practices and green certification, with additional awareness campaigns targeting tourists to encourage sustainable behaviour.

To improve social inclusion and accessibility, Wallonia is working to develop inclusive tourism offers for people with reduced mobility and vulnerable groups while promoting social and solidarity tourism initiatives. Policies in the tourism sector seek to promote economic resilience and local value creation by reinforcing local supply chains in areas such as hospitality, crafts and cultural events, while also encouraging the diversification of tourism segments to address seasonality and market concentration. Tourism Wallonia has entrusted the 26 organisations that represent “touristic areas” to manage partnerships with local offerings, including local producers and artisanal crafts.

Labour shortages and skills development remain a key priority for Wallonia. The development of a sector-wide tourism brand under VISITWallonia aims to make tourism careers more appealing, while new programmes are being introduced to develop skills for the tourism workforce. Programmes include training in digitalisation, multilingual hospitality and eco-responsible practices and the professionalisation of nature guides and hospitality staff to meet new visitor expectations. Workforce development will also be integrated into the VISITWallonia platform for better co-ordination.

Supporting the digital transition of tourism businesses in Wallonia

Wallonia has implemented the 'My Digital Baggage' platform to support the digitalisation of tourism SMEs. More specifically, it aims to help tourism businesses adopt digital tools that help them better connect with tourists and meet their digital demands. It is based around three key tools:

- Digital maturity diagnostics: Created as a starting point for skills development. Based on questions about the five stages of the customer journey, the diagnostic provides a clear view of the strengths and/or areas for improvement in digital matters. The diagnosis can be carried out independently or accompanied by a provided digital coach.
- Digital training and actions database: A catalogue of nearly 200 actions to help improve digital skills. The catalogue provides training, awareness-raising activities, workshops and webinars, and personalised support mechanisms.
- Digital vouchers: Up to 25 vouchers are offered to each tourism establishment to finance actions specially developed as part of this project (e.g. diagnosis support, audit of digital tools, personalised support). Vouchers are provided to managers of registered tourist facilities and are valid for 2 months once requested.

The website also includes a section on digital accessibility to help businesses provide an inclusive welcome and a seamless experience for all travellers, regardless of their needs.

My Digital Baggage is an initiative of Tourism Wallonia in partnership with VISITWallonia, the Forem Tourism Competence Centre and other actors.

Belgium - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/uni3lq

Canada

Canada: Key tourism messages 2026

Tourism direct GVA (2025)	Tourism direct employment (2025)	Travel exports (2025)
1.8% of total GVA (equal to share in 2024)	3.4% of total employment (equal to share in 2024)	29.9% of total service exports (equal to share in 2024)

National tourism strategy: Canada 365: Welcoming the World. Every Day. The Federal Tourism Growth Strategy

National tourism administration: Department of Innovation, Science and Economic Development

National tourism budget: Cannot be precisely quantified, as tourism spans multiple ministries and funding initiatives, both directly and indirectly, across government

Key tourism policy priorities and actions:

- *Strengthening resilience* – Enhancing the sector's capacity to adapt to climate impacts, attract major international events, and address workforce pressures in support of sustained growth and stability.
- *Promoting outdoor recreation and nature-based tourism* – Maintaining and enhancing the Trans Canada Trail, supporting local tourism projects to strengthen recreational tourism infrastructure and integrating climate adaptation into infrastructure planning.
- *Advancing Indigenous tourism* – Supporting Indigenous-led tourism initiatives by working with Indigenous partners to increase access, awareness and support to foster reconciliation and inclusive economic development.

Tourism in the economy and outlook

Tourism plays an important role in the Canadian economy, creating jobs, and socio-economic growth throughout the country. In 2024, tourism directly contributed CAD 50.8 billion or 1.8% of Canada's total GVA. Tourism directly supported 702 650 jobs, and in total supports 1 in 10 Canadian jobs. Travel is one of Canada's top service exports, accounting for 29.9% of total service exports in 2025.

In 2024, Canada recorded over 19.9 million international tourist arrivals. Spending by international tourists reached CAN 31.1 billion, accounting for nearly a quarter (24%) of total tourism expenditure (CAD 129.7 billion). Canada's top three international source markets were the United States (71%), the United Kingdom (4%) and France (3%). International tourist arrivals decreased by 0.6% in 2025. Domestic tourism remains an important backbone of tourism in Canada, accounting for 76% (CAD 98.6 billion) of total tourism expenditure in 2024, with over 105.6 million domestic tourist arrivals recorded.

Destination Canada's 2023 Tourism Outlook projects that if Canada's tourism sector continues its current trajectory, internal tourism expenditure could surpass CAD 150 billion by 2030.

Tourism governance

In Canada, all tiers of government play a role in supporting the tourism sector. The Department of Innovation, Science and Economic Development is responsible for tourism policy development at the federal level and collaborates across government on tourism related policies. Regional Development Agencies and other federal entities also play an important role in delivering programmes and services that benefit tourism operators – both through dedicated, tourism-specific initiatives and broader programming accessible to businesses, including those in the visitor economy.

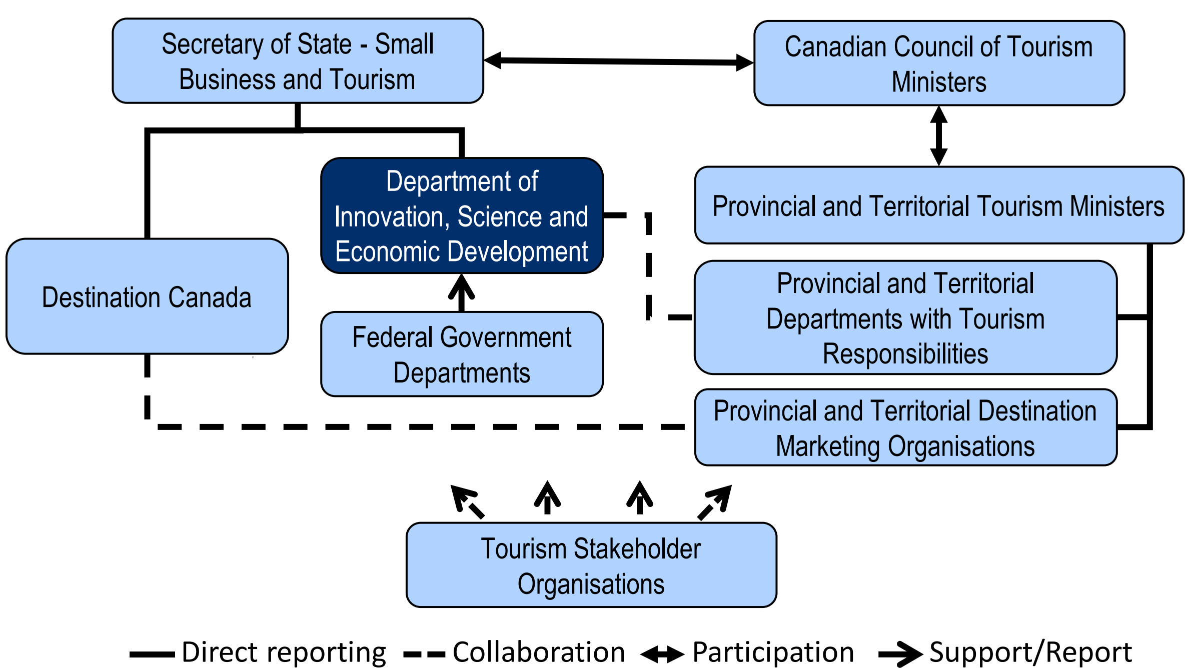
Destination Canada is the national destination marketing organisation responsible for promoting Canada internationally, securing business events, conventions and meetings and providing data and analytics to inform decision making by tourism sector enterprises and stakeholders.

The Canadian Council of Tourism Ministers works to ensure horizontal and vertical co-ordination among the levels of government, bringing together the federal, provincial, and territorial tourism ministers annually to discuss trends and issues facing Canada's tourism sector, and identify collaboration opportunities. In 2025, the Council established working groups focused on innovation, investment and tourism emergency management.

Provincial and territorial governments are responsible for tourism promotion (domestic and some international), destination and product development, regulation of accommodation services, and hospitality and tourism education.

The funding landscape for Canada's tourism sector is largely based on multi-year, time-limited commitments. For instance, Budget 2025 proposes to provide CAD 116.3 million over two years to Parks Canada and Canadian Heritage, starting in 2026-27, to renew the Canada Strong Pass for the holiday and summer season. Budget 2025 also included investments in transportation and community infrastructure that support tourism competitiveness indirectly, including upgrades at regional airports, measures to strengthen marine port investment, and broader connectivity-enabling infrastructure across Canada.

Canada: Organisational chart of tourism bodies



Source: OECD, adapted from Innovation, Science, and Economic Development Canada, 2026.

Tourism policies and programmes

The Canadian tourism sector’s strategic direction is guided by the Federal Tourism Growth Strategy, which was launched in 2023. The Strategy’s five priorities, investing in tourism assets, embracing outdoor recreation, partnering on Indigenous tourism, attracting international events, and improving federal co-ordination, are central to federal efforts.

Progress on key metrics continues to be measured. For example, the Strategy aims to improve Canada's World Economic Forum Global Travel and Tourism Development Index ranking from 13th in 2021 to 7th by 2030. Canada has already made significant progress, climbing to 11th place in the 2024 index thanks to strong performance in a competitive global market. Canada continues to work toward its goals through a number of key programmes and investments:

- The Tourism Growth Programme invested CAD 108 million over three years until March 2026 to help the tourism sector grow and develop local projects, delivering targeted investments to over 555 projects across the country, with 20% of funding going towards Indigenous initiatives.
- The Indigenous Tourism Fund (CAD 26 million), launched in 2023 to accelerate the growth of Indigenous tourism in Canada. The programme has supported 326 Indigenous tourism operators of micro and small businesses to address barriers and visitor readiness while also helping to develop 18 key Indigenous tourism destinations through the Signature Indigenous Tourism Experiences Stream. Collectively, these projects are expected to maintain or create hundreds of jobs across the country, including more than 300 new full-time, part-time, and seasonal positions. Several projects are projected to boost regional tourism, with estimated visitor numbers is expected to be over 663 000 across all recipients.
- The International Convention Attraction Fund was established to secure major international business events. As of December 2025, this fund had already helped secure 104 international events for Canada, with an estimated economic impact of CAD 734.6 million. An investment of CAD 60 million has been provided over three years.
- Co-hosting the 2026 FIFA World Cup alongside the United States and Mexico. This collaboration includes joint promotional efforts, infrastructure co-ordination, and streamlined travel facilitation.
- The Canadian Tourism Data Collective to provide accessible and centralised tourism data for decision making (see box below).

Destination Canada’s NorthStar partnership network brings together leading destination marketing and management organisations from across the country. This network plays a critical role in aligning increasing visitation, tourism spending, and investment and marketing efforts by promoting Canada’s diverse regions and experiences. Support is also being provided to provinces, territories, and industry stakeholders to implement targeted training, recruitment, and retention strategies. This includes support for upskilling and reskilling programmes, immigration pathways for tourism workers and initiatives to improve working conditions and career mobility within the sector. Special attention is being given to underrepresented groups, including youth, newcomers and Indigenous Peoples, to build a more inclusive and diverse tourism workforce.

Enhancing access to tourism data in Canada

Traditionally, tourism data in Canada is collected, processed, organised, and disseminated by Canada's central Statistical Agency, Statistics Canada. While this ensures tourism data follows the international standard for the system of national accounts and the Tourism Satellite Accounts framework, it poses challenges to measuring the impact of programme and service delivery, particularly related to geographic and demographic granularity and the timeliness of data.

The Canadian Tourism Data Collective, launched by Destination Canada in 2024, with the support of Innovation, Science and Economic Development Canada (ISED) and Statistics Canada, has been designed to enhance access to reliable, data-driven insights across the tourism sector. It serves as a strategic data platform that enables industry stakeholders, community representatives, and government institutions to access robust, evidence-based insights.

The Data Collective features:

- Dashboards highlighting tourism performance through future-focused indicators and economic modelling.
- Publications communicating findings on topics that matter most for tourism stakeholders.
- Traveller Profiles that will drive audience segmentation, targeting and marketing ROI.
- Geospatial Mapping to inform supply-side intelligence and investment decisions.

The platform integrates AI-powered products to support informed policy development and decision making across Canada's tourism economy through timely and actionable intelligence.

Canada - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/o3hcxa

Chile

Chile: Key tourism messages 2026

Tourism direct GDP (2019)	Tourism direct employment (2024)	Travel exports (2024)
3.3% of total GDP (equal to share in 2018)	6.9% of total employment (up 0.1 percentage points since year)	27.0% of total service exports (up 3.5 percentage points since year)

National tourism strategy: National Strategy for Sustainable Tourism 2035

Responsible government agency: Ministry of Economy, Development and Tourism

National tourism budget: CLP 55.7 trillion (2025)

Key tourism policy priorities and actions:

- *Strengthening institutional frameworks for tourism* – Progressing current legislative activity to better promote and finance tourism and establish the International Tourism Promotion Commission for improved governance.
- *Promoting green tourism transformation and climate resilience* – Focusing on protecting natural attractions and natural capital investment while implementing a climate change adaptation plan and risk and disaster management strategies in tourism planning.
- *Improving tourism connectivity* – Implementing the Strategic Infrastructure Plan (air and land) to position transport infrastructure as an enabler for sustainable tourism growth and overcome physical barriers that limit access and destination diversification.

Tourism in the economy and outlook

Tourism is an important sector for the Chilean economy. Tourism directly contributed CLP 6.5 billion to the economy, or 3.3% of total GDP, in the last full year with available data (2019). In 2024, tourism-related industries employed 637 600 people, or 6.9% of total employment, an increase of 17 900 people compared to 2023. Tourism is Chile's second largest export, with travel accounting for 27.0% of total service exports in 2024.

International tourist arrivals reached 5.2 million in 2024, following a 40.4% increase from 2023. The main Chilean inbound markets were Argentina (39.9%), Brazil (15.0%) and Bolivia (8.9%). In 2025, arrivals increased by a further 14.6%.

Domestic tourism is the backbone of tourism demand in Chile, generating 61.6 million overnight visitors in 2024. This was a 1.7% increase compared to 2023, reaching a new historical record.

Tourism governance

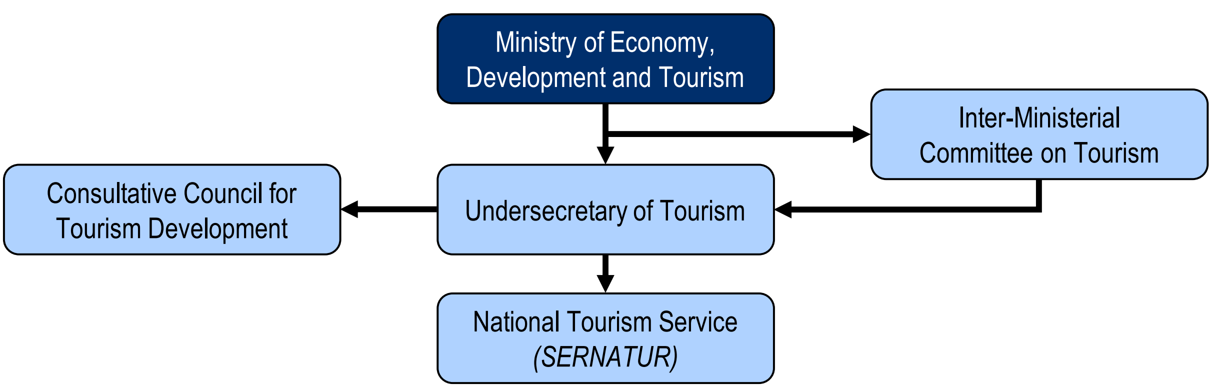
The Undersecretariat of Tourism of the Ministry of Economy, Development and Tourism defines and co-ordinates public policies on tourism, with the co-operation of public and private actors in the sector, and the participation of civil society, to generate positive impacts for territories and local communities. It is responsible for the design and implementation of public policies, plans and national tourism strategies. The Committee of Ministers for Tourism and the Advisory Council for Tourism Promotion are the two main co-ordination and consultation mechanisms for tourism at the national and regional levels.

The National Tourism Service (SERNATUR) implements national tourism policies, plans and strategies, under the supervision of the Undersecretariat of Tourism. SERNATUR has regional offices in each of Chile's 16 administrative zones (Regions), presided over by a regional Director. It also has local tourism offices in some territories, such as Easter Island, San Pedro de Atacama, Chiloé and Puerto Natales.

Through Chile’s network of regional offices, SERNATUR co-ordinates activities with relevant actors in the tourism sector, such as the regional governments. These bodies oversee the higher administration of the regions and work collaboratively with other government agencies. Chile has a political-administrative division at the local level, with a total of 346 communes or municipalities. Of these, 309 have local tourism offices.

A total budget of CLP 55.7 trillion was allocated to the Undersecretariat of Tourism and the National Tourism Service in 2025. Of this amount, CLP 16 trillion was allocated to the National Regional Development Fund, which provides additional funding for tourism at the regional level, and approximately CLP 10 trillion was for the tourist attraction programme.

Chile: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Economy, Development and Tourism, 2026.

Tourism policies and programmes

The National Sustainable Tourism Strategy 2035 provides a roadmap for the Chilean tourism sector and reflects the country's commitment to sustainable and productive development, considering tourism as an engine for economic growth in its regions. It seeks to respond to the current challenges facing the sector and prepare communities and tourist destinations for a more resilient and sustainable future. Decentralisation, inclusion, and equity are fundamental principles that guide this strategy, ensuring that all regions of Chile, according to their own characteristics, can benefit equitably from tourism development. Tourism intelligence and planning is another central theme, and the strategy promotes the use of data for better decision making, including through the development of a new data platform “MapaTurismo Chile” to provide better integration and availability of existing data (see box below).

Strengthening institutional frameworks and better defining tourism as a policy lever is a priority for Chile. This is being progressed through the continued updating of legislative procedures that aim to improve tourism promotion and management, including the Tourism Reactivation Bill and the Adventure Tourism Standard Bill. Key initiatives included in these bills are:

- The establishment of VAT refunds for foreign tourists and meetings and conference tourism
- The creation of a 1.25% accommodation tax for foreign tourists, including on bookings through digital platforms, that will contribute to the new International Tourism Promotion Fund, and
- An institutional modification that establishes the International Tourism Promotion Commission with public-private participation for better governance.

The Adventure Tourism Standard Bill not only seeks to elevate the quality, formality, and safety of the country's offerings, but also strengthen its inspection powers and increase penalties for non-compliance with safety standards and other regulatory obligations.

Chile is also seeking to protect its natural attractions and maintain continuity of the value chain in the face of global uncertainty through a green and resilient transformation of the tourism sector, focused on natural capital investment and inter-ministerial governance. This is being carried out through the implementation of two plans:

- Climate Change Adaptation Plan for the Tourism Sector: Approved in November 2024, the Plan aims to strengthen the capacity of the tourism sector in Chile to address climate change through intersectoral co-ordination, preventive action in the face of climate events, minimising the negative impacts of the sector, and achieving greater adaptation and resilience of tourist destinations and services, integrating local communities and incorporating a gender perspective in all phases of development.
- Disaster Risk Management Plan for the Tourism Sub-sector: Approved in March 2025, the Plan seeks to establish a framework for the planning and implementation of strategic actions for disaster risk reduction associated with the mitigation and preparedness phases, through the co-ordination of resources and capacities for the tourism response.

Work is underway to promote the decarbonisation of the sector and the consolidation of environmentally responsible and profitable tourism. The recently created Biodiversity and Protected Areas Service established the legal framework for tourism activity in 22% of the national territory (Protected Areas). The Framework requires the tourism sector to actively contribute to the conservation and regeneration of biodiversity through the application of the natural capital approach and the valuation of ecosystem services in the sustainable management of tourism in these areas.

Improving connectivity can help to overcome the physical barriers that limit access and destination diversification. Co-ordinated action is being undertaken to ensure transport infrastructure is an enabler for the sector's sustainable growth through the improvement and expansion of air connectivity and the reduction of gaps in land connectivity. Work is underway to improve the national road network and close the gaps that currently impede or complicate access to certain areas with high tourism potential. This action is essential for the geographical de-concentration of tourist flows, enabling the development of destinations across the entire country.

Structural employment challenges are being addressed by increasing professionalisation and inclusion in the tourism workforce. Competency development and sector specialisation programmes are being promoted to raise the standard of tourism service. Simultaneously, measures are being implemented to combat informality and job temporality, including the design of specific incentives that facilitate talent retention, especially in tourism SMEs. Crucially, these employment policies have a strong inclusion component, seeking to reduce inequality and job security gaps with a particular focus on youth, women, and LGBTIQA+ individuals, ensuring that growth generates quality employment opportunities and is equitable for the territories. The tourism sector is also being encouraged to access existing economy-wide employment subsidies targeting young people and women.

Creating a tourism information platform in Chile

Through the development and implementation of tourism policies in the post-COVID period it became apparent that tourism data in Chile was fragmented, highly aggregated and untimely. This made it difficult to develop evidence-based policies for the sector. The challenge was to integrate these official data sets and make them readily available in a user-friendly interface to local authorities and the public, without requiring statistical support. The solution had to harmonise geographies and territorial hierarchies (country, region, commune), automate quality controls, comply with data protection regulations, while being cost-efficient.

The resulting solution, MapaTurismo Chile, provides a multi-level tourism information platform that consolidates official sources and allows for the visualisation, consultation, and reporting of key tourism indicators, including visitor flows, tourism supply, economic impacts, and territorial level statistics. The platform links dispersed official data from multiple sources through open standards using low-load cloud services and maintains an emphasis on ease of use. This system relies on an automated collection, including web scraping where APIs aren't available, and has automated data validation checks to flag inconsistencies and anomalies before publication. Data protection is ensured by publishing only aggregated outputs and applying anonymisation principles.

The platform includes graphical, reader, and timeline modes of use, and generates downloadable reports to support planning, management, and monitoring at different levels of government. The platform remains relatively cost-efficient as it is a self-developed solution with a lightweight architecture.

Chile - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/mczno4

Colombia

Colombia: Key tourism messages 2026

Tourism direct GVA (2024)	Tourism direct employment (2024)	Travel exports (2024)
2.2% of total GVA (equal to level in 2023)	3.9% of total employment (up 0.3 percentage points since 2023)	48.1% of total service exports (up 0.9 percentage points since 2023)

National tourism strategy: Sectoral Tourism Plan 2022-2026: "Turismo en armonía con la vida"

Responsible government Ministry of Trade, Industry and Tourism

National tourism budget: USD 108 million (2025)

Key tourism policy priorities and actions:

- *Facilitating a culture of peace through tourism* – Strengthening the inclusion and participation of communities and territories in the country's tourism development and promoting the social function of tourism as a tool for guaranteeing rights and fostering human development.
- *Building equity and the well-being of people in tourism destinations* – Promoting territorial development through tourism by strengthening governance, infrastructure and connectivity to improve the livelihoods of local communities.
- *Utilising tourism as a driver of sustainable economic growth* – Positioning tourism as a source of economic growth for communities with minimal impact on ecosystems, improving the quality of life of residents and visitors and protecting the environment and its resources.

Tourism in the economy and outlook

Tourism is an important contributor to the Colombian economy. In 2024, tourism contributed COP 33.4 trillion or 2.2% of total GVA, which is up 4.7% compared to 2023 and continues the steady recovery since 2020. Tourism supported 899 200 jobs, or 3.9% of total employment, representing an 8.4% increase compared to 2023. Travel exports accounted for 48.1% of total service exports in 2024.

Colombia welcomed a record 7.1 million international arrivals in 2024, an increase of 14.6% compared to 2023. The main source markets were the United States (16.9%), Mexico (5.2%) and Ecuador (4.9%). International tourism accounted for almost three-quarters (73.6%) of tourism consumption in 2024, or COP 49.2 trillion. International arrivals decreased by 15.3% in 2025.

Domestic tourism continues to surge with 54.8 million domestic overnight trips in 2024, 15.4% above 2023.

Tourism governance

The Ministry of Trade, Industry and Tourism (MINCIT) is responsible for tourism policy in Colombia. Every four years, it develops the National Tourism Policy, based on the National Development Plan. An Integrated Destination Management Strategy enables intergovernmental co-ordination in the planning and management of tourism activities, resources, and stakeholders.

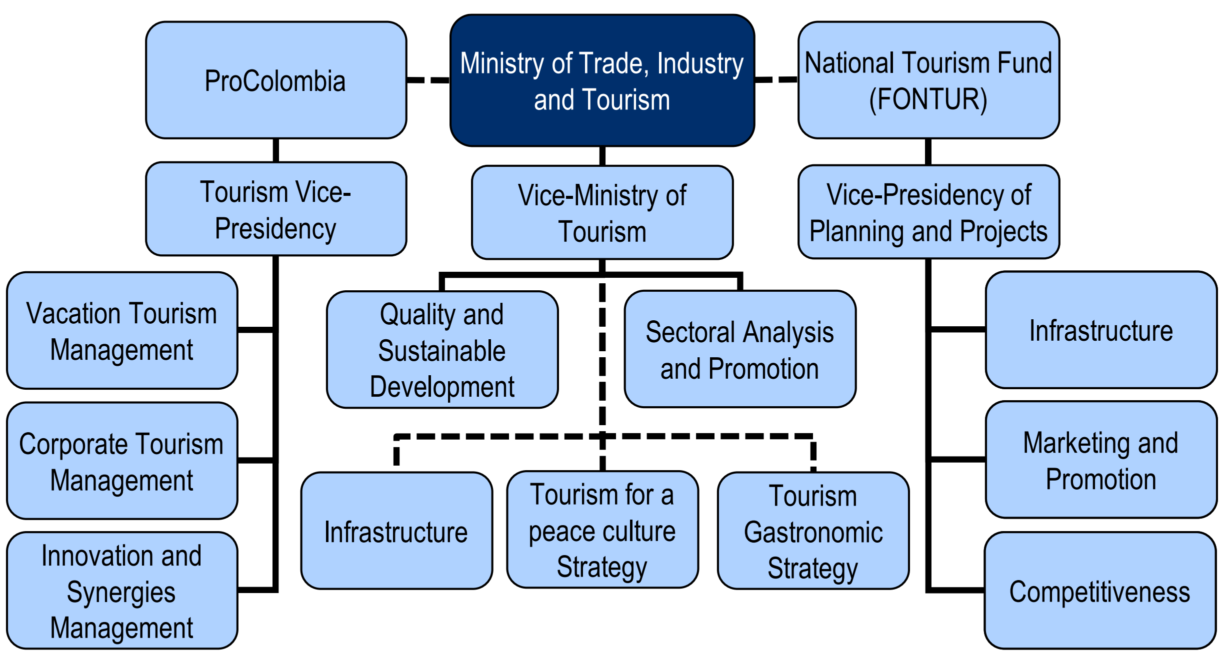
At the national level, the Ministry works with three main organisations: (i) FONTUR, the National Tourism Fund affiliated with the Ministry; (ii) ProColombia, the agency in charge of international promotion, the expansion of Colombian companies, attraction of foreign direct investment, positioning the country as a tourist destination and the country brand; and (iii) Colombia Productiva, which supports industry and companies to produce better quality services and greater added value to increase productivity and competitiveness.

The Ministry also collaborates with other ministries (e.g. the Ministry of Environment and Sustainable Development, the Ministry of Culture, and the National Planning Department) and consults with stakeholders and representatives of the private sector on all policies and strategies. At the regional level, tourism activities are decentralised, and their implementation is co-ordinated with regional authorities and local communities. Local authorities in each territory promote tourism.

Funding for tourism comes from the nation's general budget, mandatory contributions from tourism service providers (parafiscality), income from tourist properties and government-owned brands, and a USD 15 tax on international air arrivals.

The funding allocation for the Vice-Ministry of Tourism from the national general budget is for operating and management expenses. The main driver of investment and financing for the sector is the FONTUR, whose total investment budget for 2025 amounted to approximately USD 108 million.

Colombia: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Trade, Industry and Tourism, 2026.

Tourism policies and programmes

The Sectoral Tourism Plan 2022-2026 provides the national strategy to guide the development of tourism in Colombia. The main goal of the Plan is to build the capacity of the tourism sector to consolidate the sustainable, responsible, and regenerative development of tourism by improving inclusion and innovative practices across government entities, businesses, communities, and territories. This can provide opportunities to create social and economic value in the tourism offer, boosting traveller demand and enhancing Colombia's tourism profile and recognition. The Plan is supported by numerous complementing strategies including the Cultural Tourism Policy, National Sustainable Tourism Policy, National Strategy of Peace Destinations, and the National Gastronomic Tourism Strategy. Comprehensive support is also being provided to tourism regions to implement and execute the management models established in these programmes, including through the Territorial Tourism Development Level Platform (see box below).

The Tourism for a Culture of Peace Strategy has been implemented to promote the sustainable development of territories that were highly affected by armed conflict. It aims to create opportunities for economic development by strengthening tourism experiences that highlight historical memory, foster the local economy, promote a culture of peace, and support the reconstruction of the social fabric. With an investment of over USD 4 million, more than 480 productive units (both individuals and businesses) have been integrated into tourism sector supply chains, led by victims of the armed conflict, signatories of the peace agreement, people in processes of substitution of illicit crops, demobilised persons, and former combatants. In addition, 774 entrepreneurs have been authorised to use the "Colombia, Destinations of Peace" label; 903 entrepreneurs offering tourism products associated with peace have been profiled; 100 tourism experiences and 4 memory and peace tourism corridors have been strengthened; and the Tourism Network of Destinations of Peace has been designed.

To position Colombia as an accessible tourism destination, USD 1.7 million has been invested to improve accessibility at 178 attractions for people with visual and hearing disabilities and creating strategic accessible tourism plans for 10 destinations. To strengthen skills and human capacities in historically excluded populations 470 public educational institutions have joined the "Colegios Amigos del Turismo" programme, with more than 33 000 actors trained across the tourism value chain. This includes more than 2 000 participants in the Sustainable Rural Tourism course, 200 participants in the Creative Experience Design and Cultural Tourism course and 140 Indigenous leaders trained through in the Intercultural School of Indigenous Tourism. There have also been 780 scholarship recipients to improve professionalism in the sector.

Investment in infrastructure has become a priority to support community development. An investment of over USD 6 million has been made through 22 tourism infrastructure projects across 12 departments. These projects have aimed to transform and revitalise existing spaces to strengthen community-based tourism. In addition, Colombia is currently working to construct and install 88 tourism piers, which are located in both riverine and marine environments to ensure the safe docking, boarding, and disembarking of passengers for recreational and tourism purposes.

The Sustainable Tourism Policy seeks to strengthen the sustainability of the tourism value chain in Colombia to improve competitiveness, ensure the conservation and responsible use of natural capital, and generate greater added value and differentiation for the country. A key achievement has been establishing partnerships with national and international institutions to strengthen implementation of this policy, including: a memorandum of understanding with the World Wildlife Fund (WWF); adherence to the Global Tourism Plastics Initiative with UN Tourism and to the Baku Declaration; and work plans with Swisscontact and the German Agency for International Cooperation (GIZ).

The Responsible Tourism Strategy aims to position Colombia as a tourism destination recognised for good practices across the sector's value chain, ensuring that tourism activities are carried out in a respectful, committed, sustainable, and responsible manner with the territory and its local population. Actions under this strategy are organised into eight programs or thematic areas, with five focused on crime prevention and three on promotion.

The sectoral Innovation and Digital Transformation Strategy "Turismo 4.0 for All" is a structural and systematic plan which aims to accelerate digital transformation and foster innovation in Colombia's tourism sector through capacity building, technological solutions, and disruptive business models. It integrates projects, partnerships, and technological tools that strengthen sector traceability, interoperability, and analytics, while promoting participation and co-creation by communities, local governments, tourism service providers, entrepreneurs, and strategic allies. Through this Strategy, 630 participants have been trained in digital competencies, 22 projects were incubated in the UN Tourism Community Tourism Contest in 2024. This resulted in the creation of the first community tourism digital ecosystem, Econexia, integrating 300 community tourism providers, and the first digital transformation programme for small accommodation providers has been developed in partnership with the TeAcerca.travel platform.

Strengthening tourism destination development in Colombia

Integral Destination Management is a public-private co-ordination instrument that enables the development of regional co-operation and integration strategies, facilitating the exchange of experiences, knowledge, practices, and resources across the tourism sector. It aims to provide comprehensive support to regions through the implementation and execution of management models established in programmes created by the Vice-Ministry of Tourism. As part of this instrument, technical assistance has been provided to implement the Territorial Tourism Development Level Platform (NDTT) to strengthen local planning.

The Platform is a methodological tool that determines a destination's current tourism development level based on the evaluation and analysis of quantitative and qualitative supply and demand criteria. It organises and consolidates key information about destinations to provide a comprehensive view of their tourism situation. Through a structured system of components and indicators, the Platform identifies gaps, progress, institutional capacities, territorial conditions, and critical factors influencing performance. This tool enables comparative analysis among municipalities, tourism progress tracking, and the prioritisation of strategic actions, thereby strengthening planning, inter-institutional co-ordination, and evidence-based decision making.

The Platform currently has 425 registered municipalities. Of this total, 326 are in the self-diagnosis phase, where they progress in completing the methodology and uploading their indicators, a process they undertake autonomously with support from territorial managers.

Colombia - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/2wn8kt

Costa Rica

Costa Rica: Key tourism messages 2026

Tourism direct GDP (2024)	Tourism direct employment (2024)	Travel exports (2024)
6.3% of total GDP (up 3.6 percentage points since 2021)	7.7% of total employment (up 0.6 percentage points since 2023)	33.5% of total service exports (up 1.3 percentage points since 2023)

National tourism strategy: Costa Rica's National Tourism Plan 2022-2027

National tourism administration: Costa Rican Tourism Institute (Ministry of Tourism, Visit Costa Rica)

National tourism budget: USD 48.3 million, for marketing activities (2026)

Key tourism policy priorities and actions:

- *Managing tourism flows in destinations* – Measuring the maximum acceptable tourist limit for Costa Rica and each of the 33 tourism development centres.
- *Making tourism's social impact visible* – Updating and visualising the Tourism Social Progress Index, the most recent update in 2024.
- *Improving the accessibility of tourism* – Providing free tourism options for people with financial limitations and those belonging to groups with disabilities.

Tourism in the economy and outlook

Tourism is an important sector for the Costa Rican economy. The Costa Rica Central Bank estimates that tourism contributed 8.2% of national GDP in 2024 when considering both the direct and indirect impacts. Tourism employment also generated approximately 183 000 direct jobs. In 2024, travel contributed USD 5.5 billion to the economy, accounting for almost 34% of service exports.

According to the Tourism Satellite Account, during the period 2016 to 2021, international tourism has accounted for between 66% and 76% of tourism expenditure in Costa Rica. In 2025, there were 2.9 million international tourists, an increase of 1% compared to 2024. The top international source markets in 2024 were the United States (56%) and Canada (9%). Countries in Europe accounted for almost 17% of international tourists.

Costa Rica is targeting 3.8 million international arrivals by 2027, generating USD 4.9 billion in foreign currency.

Tourism governance

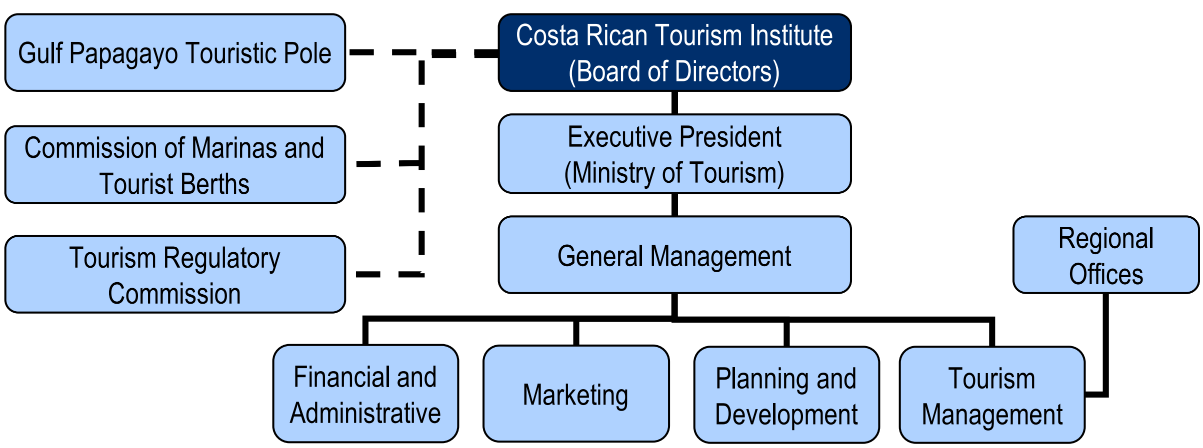
The Costa Rican Tourism Institute, an autonomous state institution founded in 1955, is responsible for formulating public policy, designing and executing technical and legal instruments to implement tourism policy, and drafting and managing the National Tourism Plan. The main roles of The Tourism Institute are to increase tourism in Costa Rica, promote the construction and maintenance of tourist accommodation and attractions, manage the brand and promote the country overseas, and attract national and foreign investments.

The Tourism Institute collaborates with other relevant governmental bodies. It has a standing co-operation agreement with the Trade and Investment Promotion Agency of Costa Rica, established in 1996, which creates a strategic alliance for the promotion and attraction of foreign investment projects for tourism infrastructure. An agreement with the Ministry of the Environment provides the necessary infrastructure in National Parks with resources of the Tourism Institute. The Tourism Institutes agreement with the Ministry of Security allows the construction of police stations in key tourism destinations, which are then donated to the Ministry of Security to improve security.

The Regional Tourism Offices collaborate with the tourism sector to process the country's quality programmes, such as the Tourism Declaration and the Certificate for Sustainable Tourism, tourist transportation certificates, and tourist guide credentials. Regional Tourism Offices also collaborate to promote their regions internationally.

The Costa Rican Tourism Institute is financed mainly by revenue from entry and departure taxes and non-tax revenues from rents and leases. Costa Rica’s budget allocation to support tourism-related marketing activities in 2026 is USD 48.3 million, increasing more than USD 3 million compared to 2025.

Costa Rica: Organisational chart of tourism bodies



Source: OECD, adapted from Costa Rican Tourism Institute, 2026.

Tourism policies and programmes

The National Tourism Plan 2022-27 continues to guide the development of tourism in Costa Rica with a vision to equitably distribute the benefits, so all Costa Ricans enjoy an improved quality of life. It aims to ensure that tourism continues to be a leading economic sector while leveraging and protecting Costa Rica’s natural resources.

The Plan is complemented by the Plans of the Comprehensive Management of Tourist Destinations Programme. The Programme focuses on working in Tourism Development Centers to unite local actors, including from Chambers of Tourism, ministries of Environment and Culture, Development Associations, local organisations, municipalities and tourism entrepreneurs, to develop tourism management at the destination level for all 33 destinations. This seeks to create a support structure to build a desirable future for tourism based on the local vision. It will also mandate that destinations comply with key success factors to achieve its vision of the future and propose at least three investment projects. Monitoring will be undertaken by the Costa Rican Tourism Institute.

Costa Rica is implementing some key initiatives to address the policy priorities set out in these plans:

- To better manage tourism and tourist flows in destinations. Costa Rica is seeking to create a methodology to measure the 'maximum acceptable capacity of tourists' in destinations, both Costa Rica as a whole and each of the 33 tourism development centres, as part of the updating process of the National Tourism Plan (2027-2032).
- To make the social impact of tourism more visible, the Tourism Social Progress Index was updated in 2024. Following the update of the Index, the results were disseminated within the government, including at Cabinet level, to enable greater collaboration and generate policies to improve the indicators in areas where opportunities have been identified (looking for tailored actions).
- The improve access to tourism for people with financial limitations and those belonging to groups with disabilities, the Tourism for All programme continues to be implemented (see box below). This programme has now been in operation for two and a half years and has supported more than 3 750 tourists in co-operation with the tourism sector. It was recognised in the Ninth Edition of the Sustainable and Social Tourism Summit and in the 2026 FITUR by Fitur 4All.
- To strengthen the national tourism product, a Tourism Product Development Department has been established within the Ministry of Tourism. This team will provide technical guidance and strategic support to the private sector to help mitigate risks and ensure new products align with national tourism policy and strategic vision, starting with wellness tourism.
- To improve tourism infrastructure, Costa Rica is investing in specific projects including building a fully equipped visitor centre in Tenorio National Park and agreements to build tourist docks and make improvements to national parks.

Creating more accessible tourism in Costa Rica

The 'Tourism for All' programme aims to provide direct, personal, and barrier-free access for all people with financial limitations and those belonging to groups with disabilities to discover Costa Rica. Since its launch in June 2023, the programme has allowed more than 3 750 people to visit tourist destinations across Costa Rica. In addition, 50 letters of understanding were signed with organisations, foundations, tourism chambers and companies to further spread the benefits of the programme, with nearly 100 trips that have been taken with a wide variety of groups. Each journey has offered unique perspectives and valuable lesson from the social tourism perspective.

The Costa Rican Tourism Institute is responsible for ensuring compliance with this law, including the ongoing promotion and support for the implementation of the law through new programmes, investment and horizontal and vertical government co-operation.

The High-Level Council created by the law is working on the regulations and has agreed to meet at least once a month. The Council will analyse innovative topics such as the granting of incentives for organisations dedicated to the delivery of social tourism programmes for all people.

The increasing frequency and intensity of extreme weather events has led to the proposal to adopt regenerative tourism as a public policy. The aim of regenerative tourism is to actively restore, revitalise, and improve tourism destinations, their ecosystems, and their communities. It transforms the visitor into a conscious agent of change, engaged in environmental healing, community empowerment, and cultural preservation. Five foundational pillars have been identified to support this vision, including: active environmental restoration; social impact and community empowerment; active cultural preservation; deep connection and transformative experiences; and continuous resilience.

Costa Rica also seeks to lead by example in international fora. It has assumed multiple leadership positions including the presidency of the UN Tourism Commission on Tourism and the International Organisation for Social Tourism, and vice-presidencies of the Inter-American Commission on Tourism and the UN Tourism Statistics Committee.

Costa Rica - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/2egl49

Czechia

Czechia: Key tourism messages 2026

Tourism direct GDP (2024)	Tourism direct employment (2024)	Travel exports (2024)
2.5% of total GDP (up 0.1 percentage points since 2023)	4.3% of total employment (up 0.1 percentage points since 2023)	21.4% of total service exports (up 1.8 percentage points since 2023)

National tourism strategy: Tourism Development Strategy of Czechia 2021-2030

National tourism administration: Ministry of Regional Development

National tourism budget: CZK 1.5 billion (2025)

Key tourism policy priorities and actions:

- *Implementing effective governance systems* – Creating an effective, transparent, and multi-level tourism governance system based on co-operation between the public, private, academic and non-profit sectors.
- *Developing a competitive and high-quality tourism offer* – Supporting service innovation, modernisation of infrastructure and expansion of the tourism product portfolio, with an emphasis placed on cultural and natural heritage tourism.
- *Managing demand and visitor flows* – Strengthening Czechia's brand and image, both domestically and internationally, while developing supra-regional, cross-sectoral and thematic tourism products for targeted visitor segments and supporting off-season tourism.

Tourism in the economy and outlook

The tourism economy remains an important driver of economic growth in Czechia. Tourism directly contributed CZK 201.6 billion in 2024 (2.5% of GDP), representing an increase of 10.7% compared to 2023 (CZK 182.2 billion or 2.4% of GDP). Tourism employment accounted for 233 400 people or 4.3% of employment, representing a 2.6% increase on 2023. In 2024, travel accounted for 21.4% of service exports.

Czechia recorded 10.9 million international tourists at commercial accommodation establishments in 2025, up 4.0% compared to 2024, and 0.1% from 2019 levels. The top international inbound markets remained Germany (21%), Slovak Republic (8%), and Poland (8%). International tourism accounted for 57% of tourism expenditure in 2023.

In 2025, domestic overnight visitors in commercial accommodation increased slightly to 12.6 million, up 2.5% compared to 2024.

Tourism governance

The Ministry of Regional Development is responsible for tourism policy, competitiveness, and legislation in Czechia. The Ministry develops strategic documents and supports tourism via subsidies for public tourism infrastructure, marketing and support to NGOs. The Collegium for Tourism is the consultative and advisory body of the Minister.

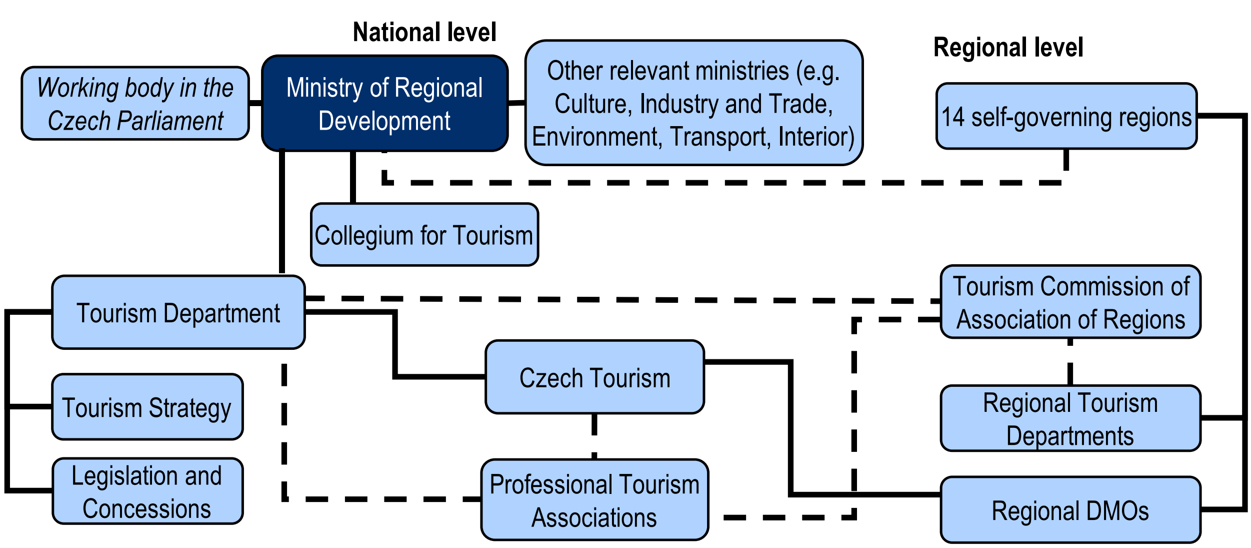
The Ministry, represented by the Tourism Department, co-ordinates with other central government ministries, departments and regions, as well as the private and non-profit sectors and academia on the sustainable development of tourism. Co-ordination mechanisms include tourism working groups, roundtables and ad hoc thematic meetings. The Ministry participates in meetings of the Commission of the Council of the Association of Regions for Culture, Heritage and Tourism and in meetings of relevant formation within the Chamber of Deputies of the Parliament usually under the Economical Committee.

CzechTourism is the state-funded national tourism organisation, established by the Ministry and supervised by the Tourism Department. It plays an important role in marketing and co-ordination with regional level organisations. CzechTourism operates 15 international offices representing Czechia in more than 40 countries across Europe, the Americas, and Asia. Close co-operation between CzechTourism and regional tourism organisations is subject to the agreed CzechTourism strategy, which follows the balanced scorecard model and includes the perspectives of both stakeholders and residents.

Every region has a tourism co-ordinator to synchronise marketing activities across all public tourism bodies and CzechTourism and to provide two-way communication between regional public tourism bodies and CzechTourism at the national level. Twice a year, the tourism co-ordinators meet CzechTourism and delegates of the Ministry. Once a year, the regional DMOs are invited to share knowledge, needs, and information.

The 2025 tourism budget was CZK 1.5 billion of which CZK 402.8 million was allocated to CzechTourism. The main source of funding for tourism comes from the state budget, but EU Funds also represent an important support mechanism for the sector, particularly for investment in tourism infrastructure. In addition, a local tourism tax is collected by municipalities, but allocation for this is decided locally.

Czechia: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Regional Development, 2026.

Tourism policies and programmes

Tourism in Czechia is guided by the Tourism Development Strategy Czechia 2021-2030. The Strategy aims to establish the country as a safe, sustainable, and competitive destination at the forefront of Europe. It aims to achieve this by implementing effective governance, delivering high-quality and innovative tourism offerings, supporting regional development, integrating marketing, research and education, and ultimately increasing the contribution of tourism to GDP, employment, and overall quality of life. The Strategy is implemented using evolving action plans. The Action Plan for the years 2024-2025 focused on supporting the sustainable development of tourism, enhancing the quality of services, increasing competitiveness, fostering regional co-operation, and effectively utilising data for marketing and innovation. The Action Plan for 2026-2027 is focused on further implementation of the previous action plan and will focus mainly on:

- Cross-sectoral, inter-ministerial and international co-operation – including support for increased direct air connections, strengthening participation in international structures, and re-activating the Inter-ministerial Co-ordination Commission for Tourism.
- Development of the tourism organisation system – including adjusting the categorisation and certification of DMOs, increasing the strategic capacity of people, and further developing national funding programmes supporting tourism infrastructure, DMO, NGOs and business investment.
- Data and decision making support – including creating a framework plan for research and surveys and the regular development of the Tourism Satellite Accounts (see box below).
- Human resources in tourism – including support to improve the employability of tourism graduates and the ongoing training and education of tourism workers.
- Marketing activities – including the development of integrated destination marketing strategies and the promotion of domestic, international and meeting and business tourism.

The Strategy is complemented by the CzechTourism and Destination Czechia Strategy 2026–2030, which introduces a more integrated and data-driven approach to national tourism governance, emphasising long-term competitiveness and sustainable destination management. It positions Czechia as a safe, authentic and diverse destination, aiming to strengthen its international image while ensuring balanced development across all regions. Tourism development strategies that align with national objectives while addressing specific regional contexts will be implemented for all 14 Czech regions.

A multi-source funding schedule has been included for the life of the current action plan to develop competitive and sustainable tourism products, integrated destination marketing, unified branding, and evidence-based decision making. Joint marketing projects between CzechTourism and certified DMOs contribute to the co-ordination of the country's image within the Commission for the Unified Presentation of the Czech Republic Abroad. The activities of certified DMOs are financially supported by the national grant scheme "Support for Destination Management Organisations 2025+", which provides state funding for their operational costs and selected marketing activities.

To attract long-haul markets, Czechia has invested in opening new direct routes to provide access to markets in the Americas and the Asia Pacific region, through South Korea, Chinese Taipei and China. The initiative involves a co-operation with Prague Airport and marketing campaigns in partnership with the respective airlines. The TouchPoint platform brings together Prague Airport, CzechTourism, Prague City Tourism and other institutions to co-ordinate activities in selected overseas and Asian markets. Within this co-operation, activities such as online campaigns, professional presentations and participation in international aviation events and forums are carried out.

Czechia conducts surveys, studies, and analyses on visitor demand, the potential of national products in selected markets, monitoring sector performance, and evaluating the effectiveness of marketing activities. Work is also underway to develop new tools to provide data and information to tourism partners. In 2025, data from the two largest mobile phone operators was integrated and analysed to draw tourism insights after a pilot in 2024. In parallel, a market consultation and subsequent procurement procedure was launched in co-operation with Prague City Tourism to establish a tool for obtaining and managing tourism data from commercial sources (e.g. payment cards, online travel agencies, review platforms).

The Tourdata.cz portal includes new interactive outputs, including analyses of seasonality in collective accommodation establishments, reports for each of the 14 regions, country reports by source market and analyses of the potential of national tourism products. The improvement of the tourism database is ensured by the Czech Statistical Office, which produces official tourism statistics and the Tourism Satellite Account, and by CzechTourism's Institute of Tourism, which conducts surveys and analyses of domestic and inbound tourism and operates the Tourdata.cz as a shared tool for public authorities and destinations.

Strengthening tourism data for decision making in Czechia

A key challenge for the tourism sector is obtaining reliable, timely and detailed data to guide evidence-based decision making. While Czechia has established a solid statistical foundation for tourism through its official statistical system and Tourism Satellite Account, further efforts are underway to strengthen the integration of data sources, expand analytical capacity and improve the timeliness and granularity of information available to policymakers and DMOs.

Current policy efforts focus on strengthening the tourism data ecosystem and improving co-ordination of data collection and analysis. The Action Plan for 2026–2027 allocates approximately CZK 1.2 billion annually to tourism policy implementation, with a significant share dedicated to the creation of a comprehensive framework for tourism research, monitoring and data-driven decision support to ensure national and regional stakeholders, including municipalities, DMOs, and private sector actors, have credible and comparable evidence to inform their decisions. Key components will include:

- **Tourism Satellite Account:** Securing regular statistical inputs to measure the economic contribution of tourism across GDP, employment, and balance of payments at the national and regional level.
- **Research Framework Plan:** Co-ordinated national surveys on tourism demand, visitor satisfaction, and the potential of flagship tourism products (e.g. spa tourism, cultural heritage, eco-tourism).
- **Digital and SMART solutions:** Expansion of mobile network data analysis and integration of alternative data sources to capture visitor flows, mobility trends and seasonal variations at both national and sub-national levels.
- **Destination Management Reform:** Giving regions responsibility for certifying local DMOs and requiring stronger participation of private stakeholders, ensuring data collection and usage are embedded at regional and local management levels.

Policy efforts focus on the long-term development and continuous expansion of tourism data, including ensuring sustainable financing for data collection and strengthening the methodological coherence of data acquisition and interpretation across different sources. Pilot projects on mobile network data and visitor mobility have provided opportunities for more accurate estimates of domestic tourism flows.

Czechia - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/k87rzj

Denmark

Denmark: Key tourism messages 2026

Tourism direct GDP (2023)	Tourism direct employment (2023)	Travel exports (2023)
2.0% of total GDP (up 0.1 percentage points since 2022)	3.4% of total employment (up 0.1 percentage points since 2022)	8.7% of total service exports (up 2.4 percentage points since 2022)

National tourism strategy: Pathways to Sustainable Tourism Growth

National tourism administration: Ministry of Urban, Rural and Ecclesiastical Affairs

National tourism budget: DKK 216.7 million (2024)

Key tourism policy priorities and actions:

- *Building a strong and cohesive international brand* – Integrating a one brand strategy into all international marketing called “Denmark – The Land of Everyday Wonder”.
- *Strengthening private investments for tourism* – Establishing a project maturity fund and new framework for tourism development that will be boosted by structural funding to improve tourism infrastructure like shelters and walking paths.
- *Providing strong and unique tourism products* – Continuing to strengthen the tourism offer with a focus on meetings and events, outdoor and nature, cycling and cultural tourism.

Tourism in the economy and outlook

Tourism is a significant contributor to the Danish economy. Tourism directly contributed DKK 55.0 billion or 2.0% of total GDP in 2023, representing a 6.8% increase compared to 2022. Tourism directly employed 110 000 persons, or 3.4% of the total workforce. Travel accounted for 8.7% of service exports in 2023.

In 2025, nights in commercial accommodation increased to 66.0 million, up 1.1% compared to 2024. This increase was driven by international visitors who spent 35.3 million nights in commercial accommodation establishments (up 3.1%), with domestic visitors staying 30.6 million nights in commercial accommodation (down 1.2%). In 2025, the top international source markets in terms of nights were Germany (representing 61.6% of all inbound nights), the Netherlands (5.2%) and Norway (4.3%).

In 2024, total tourism expenditure reached DKK 168.5 billion, which equates to a 4.0% increase compared to 2023 in current prices. Domestic tourism expenditure contributed DKK 93.1 billion or 55% of total expenditure.

Tourism governance

The Ministry of Urban, Rural and Ecclesiastical Affairs is responsible for strategic tourism development in Denmark, shifting from the Ministry of Industry, Business and Financial Affairs in 2024.

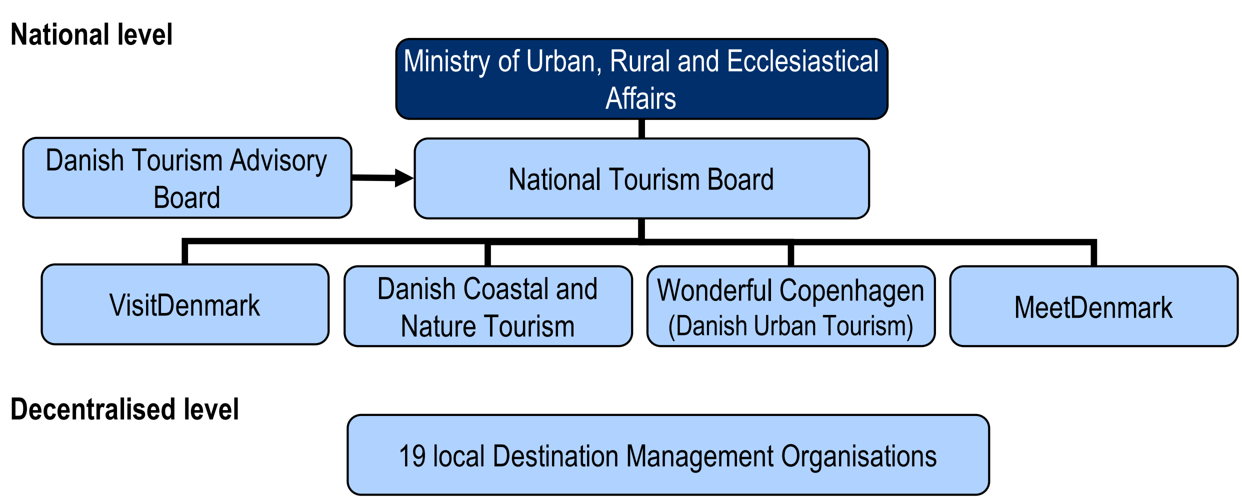
The Danish National Tourism Board supports the Danish Government in setting the strategic direction for tourism and identifying current opportunities and challenges to Danish tourism. Chaired by the Permanent Secretary of State for Urban, Rural and Ecclesiastical Affairs, the Board includes representatives from the tourism sector, universities, the national tourism organisation, VisitDenmark, and national tourism development agencies. It publishes a yearly status report on the tourism sector in Denmark.

- VisitDenmark manages the international marketing of tourism and is responsible for market research, analysis and monitoring trends and activities. It works closely with the three national tourism development agencies and local DMOs. The three development agencies are:
- Danish Coastal and Nature Tourism, which works to develop tourism outside major cities,
- MeetDenmark, which focuses on developing business tourism,
- Wonderful Copenhagen, which hosts Danish Urban Tourism and is responsible for developing tourism in Denmark's four biggest cities.

Across the country, 19 decentralised DMOs support local tourism businesses and tourism development initiatives to build strong and coherent tourism destinations. The DMOs are primarily funded by municipalities and collaborate closely with VisitDenmark on international marketing activities and with the three national tourism development agencies. The national tourism strategy guides the activities of DMOs and serves as a framework for allocating national funds for specific projects on an application basis.

In 2026, the four national tourism organisations received a combined budget of DKK 214.8 million in base funding. This included DKK 139.6 million for VisitDenmark, DKK 24.4 million for the National Tourism Development Organisations, and DKK 50.8 million to Wonderful Copenhagen. The Danish Government has allocated an additional DKK 100 million to tourism between 2024-27 and DKK 200 million to tourism between 2025-2028. There are also several funding pools open to tourism organisations to receive grants.

Denmark: Organisational chart of tourism bodies



Source: OECD, adapted from Ministry of Urban, Rural, and Ecclesiastical Affairs, 2026.

Tourism policies and programmes

The Pathways to Sustainable Tourism Growth Strategy provides guidance to ensure sustainable growth in the tourism sector across Denmark and throughout the year. Launched in October 2024, the Strategy consists of six key initiatives:

- A strong and cohesive one brand strategy in all international marketing called "*Denmark – The Land of Everyday Wonder".*
- A stronger focus on private investments in the tourism sector.
- A strong and unique variety of tourism products offered to our guests such as culture, events, outdoor and business tourism.
- A green focus where tourism contributes to a sustainable green transition.
- A foundation of knowledge and data, with a strong focus on entrepreneurship, digitalisation, and data as drivers for innovation in tourism.
- A social focus putting people at the centre, to promote social inclusion and stronger communities.

A key priority is to strengthen marketing, with a focus on attracting international tourists outside of the high season and business tourism, achieved through increased funding for VisitDenmark. Within their marketing campaigns, Denmark is adopting a one brand strategy to provide consistent and cohesive messaging to potential visitors. All marketing will be centred around "*Denmark – The Land of Everyday Wonder*". Denmark is also working with local destinations to market towards Danish tourists. This initiative will be supported by DKK 10 million in total from 2024-2027, with the aim for 40% to 60% funding split between the government and destinations. After 2027, funding is planned to be the responsibility of DMOs. To increase international accessibility, Denmark is enhancing marketing to attract new strategically important aviation routes.

To better support tourism investment throughout the country, Denmark will establish a project maturity fund as well as a better framework for tourism development, which is currently in the pilot stage. Denmark is looking to re-launch planning and building permits within the pilot scheme for coastal and nature tourism. Structural funding will be provided to improve tourism infrastructure such as shelters and walking paths.

The tourism offering will be enhanced by: strengthening meetings and events tourism; developing outdoor tourism together with nature and local communities, including new outdoor trails; and expanding the network and signage for cycling tourism. Cycling tourism will continue as a key focus as Denmark hosts Copenhagen Sprint, an annual World Tour cycling race, and prepares for the UCI Road World Championships in 2029.

Culture tourism is a key focus. Denmark established an Expert Group for culture tourism to target this inbound market. Work is also being undertaken to strengthen culture tourism within the coastal and nature regions and a new reform for museums was agreed in May 2024 to establish a new funding structure for Danish museums.

Tourism will be included in Denmark's green transition. New sustainability reporting on certified tourism businesses has been introduced, with support provided to SMEs and entrepreneurs to meet these new requirements. There is also a goal to have 70% of all accommodation establishments achieve the baseline sustainability certification before 2030. More will be done to reduce tourism's carbon emissions by improving infrastructure for electric cars, promoting cycling, and introducing green air travel.

Data and digitalisation can help to drive innovation in tourism. Denmark is working to strengthen and develop a VisitData platform, which provides open access to tourism data (see box below). The are also plans for the continued development of a Hub for Innovation in Tourism (HIT), a national initiative in Denmark that aims to strengthen the tourism sector and enhance competitiveness by connecting startups with established tourism operators. First developed in 2021, the Hub helps entrepreneurs to test, develop, and market their solutions in the dynamic landscape of tourism.

To address current tourism workforce issues, key initiatives include reducing barriers and improving opportunities to attract unemployed youths, boosting training opportunities in the sector, attracting foreign employment and strengthening the quality of education for people working in tourism.

VisitData - Connecting data to decisions through a new national data platform in Denmark

The ability of Danish tourism businesses to innovate and leverage data is crucial to strengthen the competitiveness, productivity, and efficiency of Danish tourism. Both internationally and within Danish tourism, increasingly high demands are still being placed on tourism enterprises' innovation and digitalisation. Some Danish accommodation providers have already embraced digitalisation and AI to a significant extent and work more strategically with data as a foundation for innovation and business decision making. The overall aim of VisitData is to use data as a basis for decisions and business development.

VisitDenmark and Danish Coastal and Nature Tourism have established VisitData as a national tourism platform, in collaboration with all destination management organisations across Denmark. VisitData provides access to tourism organisations' own data, and they can access national data sources such as data from the national weather service, accommodation statistics from Statistics Denmark, mobile positioning data, and transaction data. Users can also view national industry benchmarks and access a local benchmark if there are multiple businesses in the specific destination that are using VisitData. VisitData is still under construction, but VisitDenmark plans to incorporate dashboards regarding:

- Attractions
- Campsites
- Destinations
- Retail
- Events
- Holiday homes
- Hotels
- Culture
- Restaurants
- Transactions

The realisation of VisitData also enables streamlining and use of shared public data. VisitData holds great potential to support and strengthen digital innovation by providing broad access to new data insights across the tourism sector.

Denmark - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/nv5spy

Estonia

Estonia: Key tourism messages 2026

Tourism direct GDP (2024)	Tourism direct employment (2024)	Travel exports (2025)
3.7–4.8% of total GDP (3.7–4.7% in 2023)	3.9% of total employment (up 0.6 percentage points since 2023)	12% of total service exports (equal to share in 2024)

National tourism strategy: The Long-Term Outlook for Estonian Tourism 2025-2035

National tourism administration: Ministry of Economic Affairs and Communications

National tourism budget: EUR 16.6 Million for 2025 and EUR 19.7 million for 2026)

Key tourism policy priorities and actions:

- *Simplify administrative requirements for businesses, including tourism* - Removing outdated or unnecessary regulations and reducing state-level intervention, where possible, for accommodation and catering providers, travel companies, and tourist information centres.
- *Creating a data driven tourism sector* - Improving the quality, accessibility, and use of tourism data across the ecosystem, guided by an internal work plan for annual activities (to be developed in 2026) to support data-driven tourism.
- *Shifting to sustainable models of tourism* - Fostering innovation, increasing digital and data capabilities, reducing the sector's environmental footprint, supporting the adoption of sustainability certifications, and integrating sustainability principles into all processes.

Tourism in the economy and outlook

Tourism is an important contributor to the Estonian economy, with travel responsible for 12% of all service exports in 2024 and 2025. According to the Ministry's estimations, tourism directly accounted for between 3.7–4.8% of Estonia's GDP in 2024, compared to 3.7–4.7% in 2023 (and 5.4% in 2019). Tourism directly accounted for 3.9% of total employment in 2024 (below the 2019 level of 4.4%).

In 2025, Estonia welcomed 2.8 million international overnight visitors. The number is growing annually but is still 16% below 2019 levels due to Russia's war of aggression against Ukraine. The top three international source markets in 2025 were Finland (36%), Latvia (16%) and Germany (7%).

Domestic travel had largely recovered by 2024, but declined in 2025: Estonia recorded 3.48 million domestic overnight trips in 2024 and 3.05 million in 2025, 12.3% less than in 2024 and below 2019 (3.49 million). The total number of nights spent on domestic trips across all accommodation types (including both rented and non-rented accommodation) fell to 6.25 million in 2025, 14% less than in 2024 (7.26 million). At the same time, nights spent on domestic trips in commercial accommodation establishments with at least five beds amounted to nearly 3 million in 2025, around 1% less than in 2024, indicating greater stability in demand for commercial accommodation compared with overall domestic travel.

Tourism governance

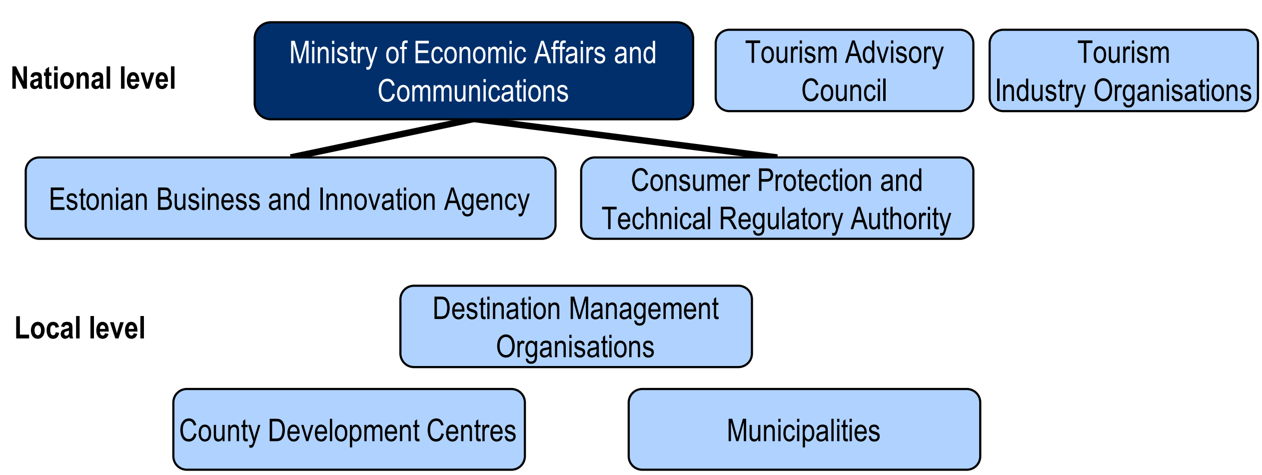
The Ministry of Economic Affairs and Communications co-ordinates national tourism policy in close co-operation with the Visit Estonia team in the Estonian Business and Innovation Agency. Visit Estonia is responsible for a large part of tourism policy implementation and plays a key role in the international marketing of Estonia as a tourism destination, strengthening the network of DMOs and co-ordinating tourism product development and customer journey experience activities. The Consumer Protection and Technical Regulatory Authority is the main supervisory authority for tourism.

Policy development and implementation includes wide consultation with tourism operators and associations including the Estonian Travel and Tourism Association, the Estonian Hotel and Restaurant Association, Estonian Rural Tourism, the Estonian Spa Association, and the Estonian Convention Bureau as well as main gateways like Tallinn Airport and Port of Tallinn. The Ministry together with Visit Estonia co-operate closely with the sector and organise regular meetings with professional and non-governmental organisations. The Tourism Advisory Council, a formal council, meets at least twice a year; the “Visit Estonia Info Morning” for DMOs and other stakeholders takes place every two weeks; monthly meetings are held between Visit Estonia, the Ministry of Economic Affairs and Communications, and DMO leaders; and a monthly sector meeting brings together a wide range of stakeholders.

Regional county development centres located in all 15 Estonian counties offer free advisory services to enterprises, local government, non-profit associations and foundations. Visit Estonia has specialist partners in 7 DMOs that offer data management services for every county. Larger cities also have their own tourism development structures (while Tallin is one of the 7 DMOs).

In 2025, EUR 16.6 million was allocated to tourism, of which EUR 10.4 million from the state budget – EUR 2.4 million for developing competitiveness and increasing added value of Estonian tourism businesses, products and destinations; EUR 5.9 million for a smart data-driven tourism marketing programme; EUR 2.1 million for targeted financing of DMOs and convention bureau; and EUR 5.8 million from EU funds. Compared to 2023, the budget has decreased due to the end of REACT-EU funding (which concluded in 2023) and general state budget cuts. In addition, around EUR 0.4 million, outside the Visit Estonia budget, is allocated as tourism expenditure by the Ministry of Economic Affairs and Communications and the Consumer Protection and Technical Regulatory Authority.

Estonia: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Economic Affairs and Communications, 2026.

Tourism policies and programmes

Tourism in Estonia is guided by “The Long-Term Outlook for Estonian Tourism 2025-2035,” which provides the strategic framework for the development of four-year action plans. The overarching goal of the Outlook is that Estonia is recognised as a renowned, sustainable, and innovative destination, with the added value of tourism doubled by 2035 (see box below). The long-term outlook sets out five strategic pillars:

- Estonia as a year-round attractive tourism destination.
- Seamless and diverse transport and digital connectivity.
- Diverse, hospitable, and vibrant tourism beyond key centres that supports local development and engages communities.
- Tourism is a stable and profitable business sector and is considered a reputable career opportunity with good working conditions.
- Estonia’s tourism sector operates smartly, innovatively, and sustainably.

The Outlook was developed through an inclusive co-creation process, involving collaboration with nearly 300 representatives from tourism and other sectors, guided by strategic foresight principles and methodologies. Strategic foresight allowed the consideration of various influencing factors and potential futures, exploring a broad spectrum of changes. The Tourism Advisory Council, established under the Ministry of Economic Affairs and Communications and led by the Minister responsible for tourism, will monitor the achievement of results.

The Tourism Action Plan 2026–2029 outlines concrete steps to implement the goals set out in the long-term outlook. It is structured around the five strategic pillars defined in the long-term outlook and includes measurable outcomes for 2029 that contribute to the 2035 targets. The Plan has been developed collaboratively with ministries, agencies, DMOs, and industry stakeholders and serves as a practical tool for prioritising resources and actions across the tourism ecosystem.

Estonia actively supports the development of sustainable tourism through strategic planning, funding, and the promotion of internationally recognised ecolabels. Tourism businesses are encouraged to adopt certifications such as EU Ecolabel, Green Key and EUROPARC, which are aligned with global sustainability standards like Global Sustainable Tourism Council and ISO 14024. These initiatives reflect Estonia’s broader commitment to sustainable tourism by integrating environmental, mobility, and regional development goals into tourism planning and infrastructure.

The internal work plan to develop data-driven tourism, to be finalised in 2026, aims to improve the quality, accessibility, and usability of tourism statistics and data through better co-ordination, automation, and collaboration. Key directions include reaching agreements with partners to update the Tourism Satellite Account; to automate accommodation statistics; to reduce reporting burdens for businesses; and to advance digital tools like real-time analytics, AI-based forecasting, and open data use.

The digitalisation and automation of tourism service providers’ workflows is supported through the Tourism Software Integration and Connectivity Support initiative. This funding enables businesses to adopt new resource management software and integrate it with other systems such as point-of-sale and accounting tools, improving operational efficiency and data quality. Training, counselling and other services to enhance digitalisation are also offered to the tourism sector by Visit Estonia and regional DMOs.

Reducing administrative burden is a key priority across the Estonian economy. The government is actively working to simplify requirements and oversight for businesses. In tourism, this includes removing outdated or unnecessary regulations and reducing state-level intervention, where possible, for accommodation and catering providers, travel companies, and tourist information centres. Under the proposed changes, employers would no longer be required to provide details of a designated workplace environment specialist to the Labour Inspectorate or have micro-enterprises submit a workplace risk assessment to the Labour

Inspectorate's database. These changes do not affect employee safety but significantly reduce the administrative burden on employers.

Estonia is planning to ease regulations on youth employment by allowing minors to work longer during school holidays and simplifying the approval process from the Labour Inspectorate. Additionally, the government is promoting flexible employment contracts to better accommodate individual needs, such as education, caregiving, and health, while ensuring minimum protections like guaranteed hours and social security.

Implementing a long-term tourism strategy in Estonia

The Long-Term Outlook for Estonian Tourism 2025-2035 serves as a strategic framework that provides direction, clarity, and long-term certainty for all stakeholders in the tourism sector, ensuring co-ordinated action and consistent policy implementation across ministries, municipalities, and industry partners. A longer arc also makes it possible to run realistic scenarios for labour supply and technology uptake problems that cannot be solved within shorter periods.

The plan also re-balances tourism success metrics from pure visitor growth to a triple bottom line. In addition to the classic net promoter performance indicator of "Would you recommend Estonia?", the strategy now includes Estonian residents' satisfaction with tourism, tracked biennially in a national resident satisfaction survey, and tourism's added value, calculated through Statistics Estonia's Tourism Satellite Account. Bundling economic, social and experiential indicators shifts the debate from visitor numbers to high-value segments and protects tourism's social licence by giving local communities measurable influence over policy choices. By pairing an extended strategic horizon with resident-centred data, Estonia offers a scalable model for destinations that want sustainable growth, higher export earnings and strong community acceptance in equal measure.

Estonia - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/0x3nsz

Finland

Finland: Key tourism messages 2026

Tourism direct GVA (2023)	Tourism direct employment (2023)	Travel exports (2024)
2.4% of total GVA (up 0.4 percentage points since 2022)	5.3% of total employment (up 0.3 percentage points since 2022)	9.9% of total service exports (down 1.1 percentage points since 2023)

National tourism strategy: Achieving more together – sustainable growth and renewal in Finnish tourism. Finland's tourism strategy and measures for 2025–2028

National tourism administration: Ministry of Economic Affairs and Employment

National tourism budget: EUR 7.8 million (2025)

Key tourism policy priorities and actions:

- *Strengthening Finland´s image as a travel destination* – Targeting international and domestic tourists to choose Finland and extend their stay, while considering needs at the more local level with specific tourism growth programmes.
- *Improving tourism stakeholder co-operation* – Developing a model that clarifies the roles of Visit Finland, regional tourism organisations and other tourism stakeholders for tourism development and promotion.
- *Strengthening tourism knowledge to enable sustainable growth* – Building on the Sustainable Travel Finland Programme to provide the sector with the knowledge and competence to manage tourism development in an economically, ecologically and socially sustainable way.

Tourism in the economy and outlook

Tourism is an important economic sector in Finland. In 2023, tourism directly accounted for EUR 5.8 billion or 2.4% of GVA, up in nominal terms from the previous high in 2019 of EUR 5.7 billion. The tourism sector directly provided 122 800 full-time equivalent jobs or 5.3% of total employment, compared to 128 600 jobs and 5.6% of total employment in 2019. Estimates for 2023 indicate that inbound tourism expenditure reached EUR 4.6 billion, 83% of the peak in 2019.

Tourist accommodation establishments in Finland recorded 6.4 million international overnight stays in 2024, 9.7% below 2019. Germany (11%), Sweden (9%) and the United Kingdom (8%) were the largest source markets. Inbound tourism increased by 16.5% in 2025 to 2.8% above 2019 levels, in line with forecasts, having taken longer to recover due to Russia's war of aggression against Ukraine.

Domestic tourism in Finland has remained robust in recent years. The 26.1 million domestic tourist arrivals in 2024 were below the pre-pandemic levels of 29.3 million, while the total number of overnights at accommodation establishments exceeded 2019-levels.

Tourism governance

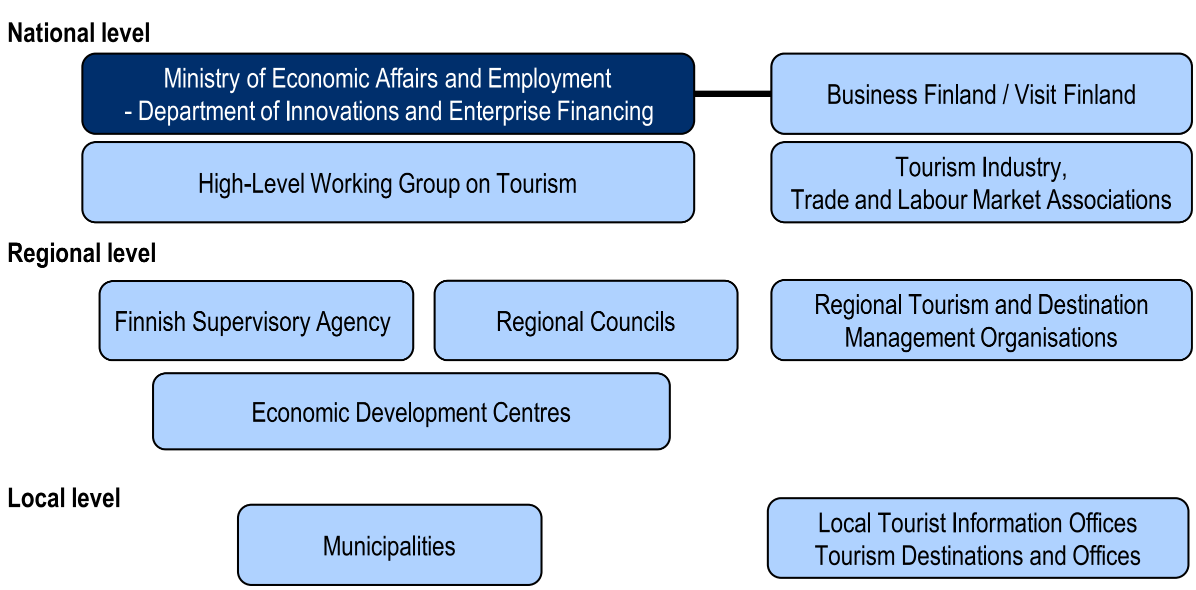
The Ministry of Economic Affairs and Employment is responsible for tourism policy development and maintaining international relations regarding tourism, collaborating closely with other ministries. The drafting of tourism-related legislation remains with responsible ministries. For example, defining differences between housing and accommodation is the responsibility of Ministry of the Environment because the definitions are part of the renewal of Building Act.

A High-Level Working Group on Tourism supports the implementation of tourism policy and preparation of tourism-related matters at the ministry level. The Working Group is composed of ministries of key importance to the tourism sector, regional councils, state administrations, regional tourism organisations, tourism businesses, trade unions, and research and educational institutions and organisations. The Working Group is chaired by the Minister of Economic Affairs and continues the work of the unofficial Inter-Ministerial Working Group on Tourism which had previously operated under the chair of the Ministry for over 20 years.

Visit Finland, the national tourism organisation, is a unit of Business Finland which offers funding, information, advice and networks for different phases of companies that aim to grow in the international market, develop future solutions and renew their business. Visit Finland is responsible for promoting Finland as a destination internationally, collecting and analysing data, and supporting Finnish tourism businesses and regional destinations in sustainable development and to operate in international markets. For 2025, the Finnish Government allocated EUR 7.8 million to Business Finland's tourism promotion and development actions.

Regional Councils provide support for tourism development projects, advisory services, training and research in Finland's 19 regions. Finland has 10 Economic Development Centres responsible for tasks related to business and industry, employment, skills and culture, land use planning and the implementation of the EU´s regional and structural policy programmes. They offer financial, advisory, consulting and training services to tourism businesses, grant investment support and manage matters related to their local infrastructure. The Finnish Supervisory Agency is tasked with national permit and supervision practices for business and industry, including the tourism sector.

Finland: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Economic Affairs and Employment, 2026.

Tourism policies and programmes

Finland's National Tourism Strategy, Achieving more together - sustainable growth and renewal in Finnish Tourism 2025-2028 was updated for a second time in 2025 to better reflect the changing operational environment. The Strategy aims to promote sustainable economic growth in the tourism sector, and it states that tourism growth must create value for tourism professionals, local communities, tourists and Finnish society. A greater emphasis is placed on mitigating seasonal fluctuations and promoting social responsibility, alongside economic growth, accessibility, recognition, and skills. In addition, the role of regional tourism organisations has become more prominent for the implementation of the tourism strategy, while quantitative indicators have been expanded to better understand the impacts of tourism from economic, environmental, and social perspectives.

The Strategy represents the shared vision and commitment of the public sector, tourism industries and other key stakeholders, to the common objectives to enhance the tourism sector for the coming years. The High-Level Working Group on Tourism played a key role in promoting the strategy update and promotes and monitors the implementation of Finland's tourism strategy 2025–2028. The Strategy is complemented by more targeted strategies as well several independent regional tourism strategies. These include for example:

- Visit Finland Strategy 2026-2030.
- Major Events Strategy 2023-2033: Promoting Finland as a vibrant and internationally interesting location for major events.
- Metsähallitus (Parks & Wildlife Finland) principles for co-operation with nature tourism businesses.
- Roadmap for the National Development of Cultural Tourism to 2030: Five target themes focus on the development of co-operation, sustainability, the range of cultural tourism products, digitalisation and knowledge-based management, as well as the utilisation of international activities and especially the Cultural Routes of the Council of Europe in cultural tourism.
- Development Program for Fishing Tourism 2024-2034: Outlines how Finland will offer a diverse range of fishing services of the highest quality in Europe by 2034, including by enhancing services and business operations, strengthening sales and marketing efforts, and improving the overall operational environment.
- Regional tourism strategies are being implemented in the Lapland, Helsinki, Southwest Finland, Central Finland and Lake Saimaa regions, among others.

Within these strategies, a core priority is to strengthen Finland's image as a travel destination for international and domestic tourists and travellers. Regions in Eastern Finland have been hard hit in recent years due to the COVID-19 pandemic, the loss of Russian tourists following the closure of the eastern border due to Russia's war of aggression against Ukraine, rising costs and labour shortages. In 2024, the government launched a programme for Eastern Finland (specifically for six hand-picked regions) to promote sustainable tourism growth. The Government allocated EUR 3 million to Visit Finland to facilitate and co-ordinate marketing and promotional activities with the tourism industry in the regions, which the regions will jointly fund. Additional activities focus on increasing sustainability and knowledge-based management in the tourism sector and strengthening connectivity of the region. The activities are implemented in close co-operation with regional tourism organisations, tourism companies and regional funding authorities.

Finland is also adopting a "nature positive" approach to minimise environmental harm and invest in nature restoration in tourist destinations. This approach includes rigorous monitoring and reporting on environmental harm and prevention efforts as well as ecosystem enhancement. Visit Finland´s Sustainable Travel Finland programme aims to make tourism operators aware of the importance of biodiversity and identify the potential impacts of their own activities on biodiversity. As part of this programme, Visit Finland developed a Biodiversity Toolkit (see box below), to help tourism businesses avoid clashes between tourism and nature. With the tools available under the programme, tourism stakeholders can seek solutions to avoid clashes between tourism and nature and between tourism and local communities, through nature-positive planning and actions. Monitoring the state of the environment with clear indicators helps to address the problem areas.

The Ministry of Economic Affairs and Employment is undertaking a study to better co-ordinate and clarify the roles of stakeholders for tourism promotion in the future. The study aims to develop a model clarifying the roles of Visit Finland, regional tourism organisations and other tourism stakeholders (e.g. Association of Tourism Organisations in Finland) in tourism promotion and development activities. The study will be done in close co-operation with the tourism sector and ministries essential to the tourism industry, and will follow with future actions.

Advancing nature-positive tourism and biodiversity in Finland

Visit Finland has published the *State of Sustainable Tourism in Finland* report annually since 2022. This national-level overview compiles data, trends and research to assess progress within the Sustainable Travel Finland (STF) programme and identify areas for further development. The 2024 edition highlighted nature-positive tourism as a key opportunity, with 41% of STF-labelled tourism businesses reporting actions that contribute positively to biodiversity.

To accelerate this shift, Visit Finland developed a Biodiversity Toolkit for tourism businesses, to raise awareness and inspire companies to view biodiversity not only as a responsibility but as a strategic business opportunity. It includes:

- Two comprehensive guides explaining the relationship between tourism, climate, biodiversity, food and wellbeing
- Workshops to support learning and collaboration
- A self-assessment tool to evaluate environmental footprint of businesses
- A set of indicators to monitor impact and enhance environmental handprint

The self-assessment tool focuses on minimising negative environmental impacts (footprint) and the indicators emphasise the potential for positive contributions to nature (handprint). The indicators span five key areas: energy and climate, waste, food, water and biodiversity. Each includes actionable steps tailored to tourism businesses, helping them understand their impact and build concrete action plans. Work is underway to expand the indicators to cover the impact on the ocean.

The toolkit is part of a broader commitment to mainstream a nature-positive approach as a cornerstone of sustainable tourism development. By integrating biodiversity into business strategy, Finnish tourism companies can help combat biodiversity loss while unlocking new value, enhancing visitor experiences and strengthening long-term competitiveness. The Sustainable Tourism Indicator system supports monitoring progress and enables timely corrective actions when needed.

Finland - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/xng9et

France

France: Key tourism messages 2026

Tourism direct GDP (2023)	Tourism direct employment (2024)	Travel exports (2024)
3.8% of total GDP (equal to levels in 2022)	7.6% of total employment (up 0.2 percentage points since 2022)	19.1% of total service exports (up 0.1 percentage points since 2023)

National tourism strategy: Destination France Plan

Responsible government agency: Ministry of Economy and Finance

National tourism budget: EUR 23.9 million (2025)

Key tourism policy priorities and actions:

- *Supporting innovative and digital tourism* – Supporting start-ups developing solutions based on innovative technologies through the France Tourism Tech programme.
- *Promoting the development of sustainable local tourism* – Encouraging visits to companies and artisan workshops, in line with the national roadmap for know-how tourism *(tourisme de savoir-faire).*
- *Harnessing existing data for tourism development* – Mapping existing databases to better exploit existing data and developing the France Tourisme Observation Data Hub to integrate tourism data for better monitoring.

Tourism in the economy and outlook

Tourism is a significant contributor to the French economy. In 2023, tourism directly contributed 3.8% of total GDP. Direct tourism employment amounted to 1.5 million jobs in 2024, which was an increase of 23 500 jobs compared with 2023. Consolidated data indicates that revenues from international tourism reached EUR 71.1 billion in 2024, and that the total consumption from both domestic and international tourists reached EUR 211 billion in 2023. Tourism contributes positively to the balance of payments. In 2024, the tourism balance (exports less imports) amounted to EUR 15.9 billion, compared to EUR 9.9 billion in 2019.

France recorded 100 million inbound tourist arrivals in 2024. The top markets were Germany (14.5% of international tourist arrivals), Belgium (14.5%), United Kingdom (12.9%), and Switzerland (8.8%). Arrivals increased to 102 million in 2025.

Domestic tourism remains a major component of tourism demand, with 235.9 million overnight stays in hotels and camping establishments in 2024, 66% of all such overnight stays in France.

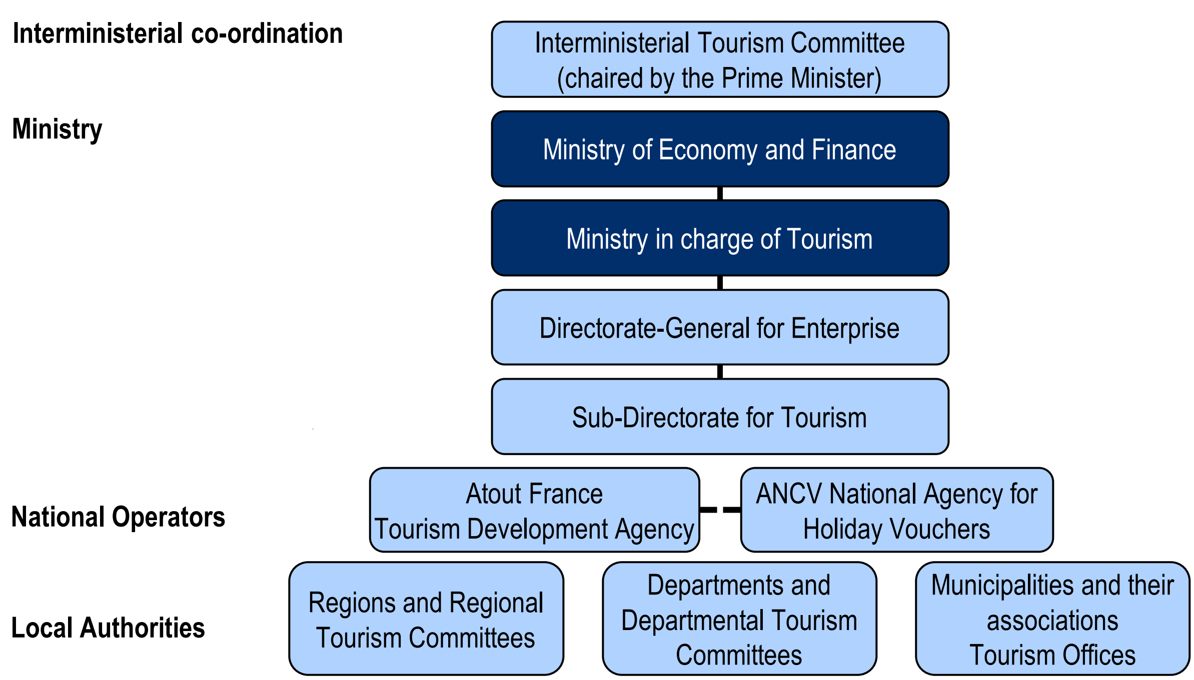
Tourism governance

The Ministry of Economy and Finance is responsible for tourism at the national level in France, implemented through the Directorate General for Enterprise. The transversal nature of tourism as an economic sector means inter-ministerial co-ordination is of great importance and is carried out by the Interministerial Tourism Committee chaired by the Prime Minister. Dialogue between public administrations and private sector representatives takes place within the Tourism Sector Committee (CFT), which brings together public and private stakeholders to guide tourism development and policy. Thematic working groups within the Committee help co-build public policies.

In France, tourism is a shared competence, with all levels of sub-national government involved in tourism policy development and implementation. Each regional council, with the support of the Regional Tourism Committee, co-ordinates public and private initiatives in the field of tourism development, information and promotion, including actions on international markets. They also collect, process and disseminate local data relating to tourism in each region. Departmental councils can set up Departmental Tourism Committees focusing on structuring the offer and supporting the stakeholders involved. At the municipal authority level, responsibility for tourism has largely been transferred from municipalities to Public Inter-municipal Co-operation Establishments.

The overall budgetary allocation for tourism from state and local authorities is difficult to calculate as it includes the contributions from multiple ministerial departments and administrative levels. Local authorities benefit from specific taxes linked to tourism which generated slightly over EUR 1 billion in revenue in 2023. At the state level, Atout France, the public operator in charge of promotion and observation, received EUR 23.1 million in public subsidies in 2025 and spent EUR 22.6 million on promotion. Their overall budget in 2025 is EUR 60.4 million.

France: Organisational chart of tourism bodies



Source: OECD, adapted from the Directorate-General for Enterprise, 2026.

Tourism policies and programmes

Since the conclusion of the *Destination France* plan in 2024, France's tourism strategy has been primarily structured around the outcomes of the Interministerial Tourism Committee, chaired by the Prime Minister in July 2025. This framework sets the direction for the country's tourism policy priorities for 2026 and beyond. It reiterates the objective set by the Destination France plan for France to become the world's leading sustainable tourism destination by 2030 and establishes a target of EUR 100 billion in international tourism receipts by 2030. The roadmap is structured around five priorities: (i) modernising the tools of public tourism policy; (ii) strengthening France's attractiveness and international influence; (iii) attracting new talent to the sector; (iv) supporting the sector through its various transitions; and (v) diversifying the tourism offer.

Complementing the Destination France Plan is the National Strategy for the Management of Tourist Flows. Adopted in 2023, the Strategy aims to preserve the balance between the development of local economic activity and the sustainability and preservation of tourist sites. The Strategy is structured around four main pillars: (i) promoting a shared understanding of tourist flow management, (ii) raising awareness among stakeholders and visitors, (iii) measuring flows and their impacts to improve management, and (iv) supporting territories in implementing effective flow management practices.

Under the Strategy for the Management of Tourist Flows, 25 pilot sites have been selected to strengthen the observation of flows in each territory and develop management strategies adapted to local specificities. The initiative, led by Atout France, provided financial support for engineering services and ran until the end of 2025. An assessment of the projects carried out will be conducted during 2026 to allow for capitalisation at the national level. A practical guide was developed, gathering key insights and concrete case studies to support flow management. A comprehensive review of the Tourism Flow Strategy is underway. New measures will be launched, such as the organisation of a Hackathon to establish a methodology for better operability of data on tourist flows.

The sustainability of tourism is a key priority for France. It is pursued through recurring measures that contribute to the objectives of sustainable and socially acceptable tourism. This includes initiatives to support slow tourism, help tourism professionals reduce their water consumption, advance work on low-carbon mobility and the preservation of biodiversity. The sustainability agenda is also reflected in the development of sustainable tourism indicators, including to measure the carbon footprint of the sector, and in the progressive greening of classification standards for accommodation.

France also supports specific tourism segments, such as "know-how tourism", that represent an important lever for local development and attractiveness for both businesses and territories. Know-how or industrial tourism (*tourisme de savoir-faire*) refers to visits to companies and artisan workshops that showcase local expertise, supporting territorial development, promoting "Made in France," and contributing to more sustainable and locally anchored tourism. The "Savoir-Faire Tourism Fund" launched in 2022, with EUR 5 million in state funding and regional co-financing, supports businesses in developing visitor experience across ten regions. Building on this, a dedicated roadmap was adopted in 2025 to scale up the sector by increasing visitor numbers, structuring key industries, improving the quality of the visitor offer, and strengthening project support mechanisms.

To support innovation in tourism, the France Tourism Tech programme is designed to foster the emergence of French champions in the travel tech sector. Each year, the programme supports approximately ten start-ups developing solutions based on innovative technologies applied to tourism, such as AI, big data, cloud computing, IoT, immersive reality, blockchain and cryptography, cybersecurity, and new mobility. The start-ups receive support from up to 70 public and private partners, including major corporations, investors and institutional stakeholders. The second cohort of start-ups, of the now permanent programme, received dedicated support throughout 2025 and the third cohort was launched in November 2025.

Structuring and integrating tourism data remains a challenge. France mapped existing databases across sub-segments of tourism (e.g. accommodation, retail, passenger transport) and organised a hackathon to promote their use (box below). Work continues on the France Tourisme Observation Data Hub. Several modules are available to institutional partners, enabling real-time monitoring of tourism activity in France and competing destinations. Other joint projects are under development within the platform, including monitoring inbound tourist spending through banking data and activity in the short-term rental market.

To strengthen the attractiveness of tourism professions for young people, France continues to organise a "Tourism Careers Week", designed to highlight the training opportunities and professions in the sector. This initiative brings together, tourism professionals and training institutions with young people aged 14 to 25 and job seekers to showcase the wide diversity of careers in the sector, the training pathways leading to them, and the related employment opportunities.

Improving tourism accessibility in France

France organised a hackathon on "Making Tourism Accessible for Persons with Disabilities" in December 2024 to improve the use of open tourism data, with a particular focus on the accessibility of tourism sites. This initiative responded to three main challenges: (i) the cross-cutting nature of tourism data, which makes mapping available data difficult; (ii) its fragmentation and under-use, limiting its potential for public policy and business innovation; (iii) the need for stronger sector engagement with data and AI, particularly in areas such as accessibility.

The event brought together approximately 60 participants over two days, including data scientists, IT students, tourism stakeholders, accessibility specialists and representatives of disability associations. The objective was to develop open-source solutions and new concrete use cases. A jury of qualified experts in tourism and accessibility selected three winning projects, all of which proposed innovative ways to use existing datasets for the benefit of persons with disabilities.

Preparatory work began in 2023 with the production of a comprehensive mapping of tourism-related datasets, covering more than 150 data sources. This mapping was published on the national open data platform in 2024 and downloaded more than 300 times in three months, illustrating strong interest from stakeholders. Building on this momentum, France organised the hackathon to mobilise professionals and innovators around tourism data and accessibility.

A restitution event in January 2025 showcased the winning projects and convened key actors from the tourism and data ecosystems.

The hackathon fostered collaboration between tourism and data stakeholders, both public and private, to develop innovative open-source solutions. It generated new concrete use cases relevant to large organisations and SMEs, stimulated the emergence of new business models, and raised awareness among participants of the challenges of accessibility. The hackathon forms part of a wider Tourism Data Roadmap, announced at the event in January 2025, which. This roadmap will support the circulation and valorisation of tourism data, both to inform public policy and to help stakeholders develop new use cases. The initial results are still pending, but other initiatives are already in the pipeline.

France - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/hd1t90

Germany

Germany: Key tourism messages 2026

Tourism direct GDP (2022)	Tourism direct employment (2023)	Travel exports (2024)
3.1% of total GDP (up 0.7 percentage points since 2021)	4.2% of total employment (up 0.3 percentage points since 2022)	8.5% of total service exports (up 0.2 percentage points since 2023)

National tourism strategy: National Tourism Strategy

Responsible government agency: Ministry for Economic Affairs and Energy

National tourism budget in 2026: EUR 40.6 million (promotion) and EUR 2.9 million (tourism-specific budget lines only)

Key tourism policy priorities and actions:

- *Reducing administrative burden for tourism businesses* – Expanding so-called 'reality checks' to reduce red tape for businesses and entrepreneurs in tourism sectors.
- *Strengthening competitiveness and improving connectivity of tourism destinations, both at a national and regional level* – Working to make mobility affordable, available and environmentally friendly with initial steps to decrease taxes, fees and charges.
- *Advancing digitalisation in the tourism sector* – Supporting tourism businesses, particularly SMEs, to make smart use of digital tools, as well as speeding up the visa application process for inbound travellers.

Tourism in the economy and outlook

Tourism is an important economic sector in Germany. In 2022, the year of the most recent official statistics, tourism directly contributed EUR 122.3 billion to the economy, accounting for 3.1% of GDP. Travel exports accounted for 8.5% of total service exports in 2024.

According to more recent estimates jointly compiled by the German Chamber of Industry and Commerce, the Federal Association of the German Tourism Industry, and the German Tourism Association, Germany's tourism sector accounted for 3.7% of GVA in 2024, only slightly below the pre-COVID level of 3.8%. The same estimates indicate that 1.6 million people were employed in tourism industries in 2024, accounting for 6% of total employment.

International tourism continues to recover but remains below 2019 levels. In 2024, Germany welcomed 37.4 million international tourists, up 7.8% compared to 2023. Germany's top three international source markets were the Netherlands (14.0%), Switzerland (8.9%) and the United States (8.6%). International arrivals to Germany fell by 0.8% in 2025. Domestic tourism is a significant contributor to German tourism and has returned to record levels, with 147.3 million domestic overnight visitors in commercial accommodation in 2024, 2.6% above 2023 levels.

Tourism governance

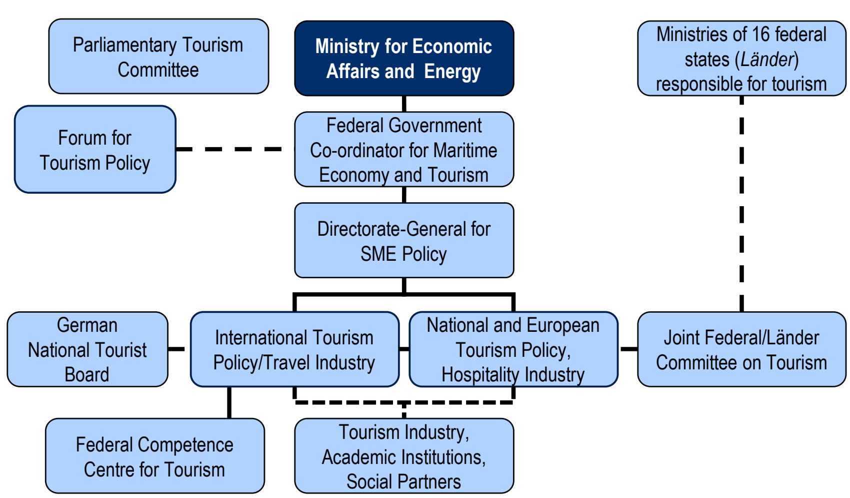
The Federal Ministry for Economic Affairs and Energy has lead responsibility for tourism policy at the federal level. Within the Ministry, the Federal Government Co-ordinator for Maritime Economy and Tourism is responsible for co-ordinating tourism policy within the Federal Government and Parliament, particularly the Parliamentary Tourism Committee.

The 16 federal states (Länder) are responsible for developing, shaping and promoting tourism. Their ministries are responsible for designing, implementing and funding policies to promote tourism development. Each federal state has a DMO that represents the interests of regional and municipal organisations. Local tourism offices co-ordinate the work of tourism SMEs, promote product design and undertake relevant marketing activities.

The Joint Federal/Länder Scheme for the Improvement of Regional Economic Structures (GRW) is a regional policy instrument which aims to offset locational disadvantages and to incentivise investment for both companies and municipal infrastructures (including basic infrastructure for tourism). This is designed to boost regional attractiveness, economic development potential, employment growth and prosperity in the assisted areas. The GRW budget set aside for tourism was EUR 1.1 billion for 2021-25, divided evenly between federal and Länder contributions, 18.2% of all GRW funds across all sectors were approved in this period. Due to the federal structure in Germany, the Länder can make use of their own budgets independently.

Financing for tourism at municipal, regional, and Länder levels comes from various sources. In addition to public funds, revenue is also generated from spa and tourism taxes besides bed taxes. In 2026, institutional support for the German National Tourist Board (DZT) is EUR 40.6 million. This funding covers national tourism promotion abroad only, with domestic tourism promotion the responsibility of each Länder. The Ministry for Economic Affairs and Energy also provides budgetary funds for selected projects to enhance performance in the tourism sector (EUR 2.9 million in 2026). Tourism also benefits from whole-of-government programmes.

Germany: Organisational chart of tourism bodies



Note: The Tourism Policy Forum is scheduled to begin its work in the year 2026.
Source: OECD, adapted from the Ministry for Economic Affairs and Energy, 2026.

Tourism policies and programmes

Germany is currently in the process of implementing a new National Tourism Strategy. The goal of the Strategy is to create the necessary framework conditions to enhance the competitiveness of the tourism sector. While the process is ongoing, it is planned to be for the timeframe 2026-2029. In addition to the National Tourism Strategy, almost all Länder have their own tourism strategies to guide their tourism development. Key issues presented in the regional tourism strategies include accessibility, digitalisation, innovation, employee satisfaction and sustainable development.

Germany's goal is to make mobility affordable, available, and environmentally friendly, improving accessibility to tourism destinations and reducing the cost burden for tourism businesses. To address this, Germany is reducing taxes for the aviation and gastronomy industries in 2026. Aviation-specific taxes will be reduced as of July 2026 to make travelling by plane more affordable and reduce the location costs for airlines. The value added tax for gastronomy was decreased from 19% to 7% as of 1 January 2026. Tour operators will benefit from a reduction in fees for insolvency protection, which is privately organised, yet supervised by the federal government.

International tourism promotion remains a key priority of the federal government, which is reflected by an increase in public funding of the national tourist board and a strengthened presence in overseas markets from 2026.

Digitalisation processes are a key element for tourism competitiveness and to exploit previously untapped potential, offering innovative solutions to current challenges such as simplifying bureaucracy, planning networks, environmentally friendly mobility, recruiting skilled workers, automating work processes, and managing visitor flows. Enhancing the smart use of digital tools in the tourism sector is one of the focus areas of Germany's National Tourism Strategy.

Attracting workers and creating modern working conditions has been a key challenge for the tourism sector. To better address this challenge, Germany will continue to develop the relevant framework conditions. A modern, more flexible working time law will help to make working hours more flexible. This new law will have a weekly maximum working time, instead of a daily, to create room for a variety of working time models, like those in the tourism sector. To facilitate immigration of skilled labour, a digital agency for skilled labour immigration ('work-and-stay agency') will be created. It will offer a centralised IT platform as a single point of contact for foreign skilled workers. The tourism sector is expected to benefit from this agency due to an above-average share of workers with an immigration background (54% of cooks, 45% in-food services and 40% in hotels, compared to 26% national average).

Cutting administrative burden and red tape is necessary to encourage innovation and growth for tourism businesses. Germany is pursuing options to reduce unnecessary documentation and instead focus on a risk-oriented approach with increased sanctions for infringements. To obtain starting points to reduce bureaucracy to a tolerable level, Germany will expand the 'reality check tool' and implement it across various areas of tourism. This involves a practical check, working with entrepreneurs and the relevant enforcement authorities, to examine processes from start to finish, analyse bureaucratic obstacles and develop practical solutions. The practical check on documentation requirements in the hospitality sector has provided some good experiences (see box below).

Tourism's cross-cutting nature means many regulations that impact tourism are negotiated in different ministries or departments. To improve collaboration and communication across ministries and with the regions, the Ministry for Economic Affairs and Energy is pursuing extensive networking with all tourism-related policy areas at the Federal and Länder level, and with stakeholders. These networking activities will take place in various panels. As a central body, a Forum for Tourism Policy will be established, co-ordinated by the Ministry for Economic Affairs and Energy. It will operate as a flexible panel with experts involved according to the issues to be dealt with.

Cutting red tape for the hospitality sector in Germany

To promote a reduction of bureaucracy in the hospitality sector, the Federal Ministry of Economic Affairs and Energy and the Bavarian State Government's Commissioner for Bureaucracy Reduction, carried out a 'reality check' of the regulatory requirements in the hospitality sector, together with industry representatives. The focus was on the areas of food hygiene, allergen labelling, occupational health and safety, fire safety and electrical checks. Key results included:

- Targeted controls instead of documentation requirements for all businesses: Restaurants and catering establishments that comply with hygiene standards should not be required to document compliance with hygiene standards as a preventative measure but only after hygiene deficiencies have been identified. For businesses that cater for vulnerable groups, such as hospital or school canteens, the comprehensive documentation requirements remain in place.
- No over-fulfilment when implementing EU regulations on the national level: According to existing EU regulations, the origin of food can be traced via mobile phone photos - a stricter application of these regulations should be avoided.
- Transparency and simplification: Businesses need to understand what the law requires of them. Clearer rules on fire safety, for example, including on inspection intervals and persons authorised to carry out inspections, will save time and money. Standardised requirements by the Länder are also helpful.

The Federal Ministry for Economic Affairs and Energy is committed to implementing these and further measures.

Germany - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/6x3r18

Greece

Greece: Key tourism messages 2026

Tourism direct GVA (2024)	Tourism direct employment (2024)	Travel exports (2024)
7.3% of total GVA (up 0.3 percentage points since 2023)	14.4% of total employment (up 0.6 percentage points since 2023)	42% of total service exports (equal to levels in 2023)

National tourism strategy: Annual Action Plan 2026, Marketing Strategy 2025-2028

National tourism administration: Ministry of Tourism

National tourism budget: EUR 162.6 million (2025)

Key tourism policy priorities and actions:

- *Co-ordinating the sustainable management of tourism destinations* – Incentivising the use of an established governance framework in Destination Management and Marketing Organisations to drive optimal destination management.
- *Diversifying the tourism offer* – Building on the existing tourism product portfolio, including health and wellness tourism, maritime tourism, mountain tourism, gastronomy and agritourism, to increase the quality of services, competitiveness and resilience of the sector.
- *Improving the evidence base for tourism* – Setting up a National Observatory for Sustainable Tourism Development in Greece and implementing a consistent Tourism Satellite Account to better track tourism performance.

Tourism in the economy and outlook

Tourism is vital to the Greek economy. The sector directly contributed EUR 15.1 billion to the economy in 2024, equivalent to 7.3% of total GVA. Tourism directly employed 613 900 people, or approximately 14.4% of the total Greek workforce.

International tourism accounted for 27.4 million arrivals in accommodation establishments in 2024, a 4.2% increase compared to 2023. These international visitors spent 128.2 million nights, accounting for 83.8% of all nights. In 2024, travel receipts totalled EUR 21.6 billion, up 4.9% in current prices compared with 2023. The top source markets for overnight tourists were Germany (13%) the United Kingdom (11%) and Bulgaria (7%). Arrivals from Germany (5.4 million) increased 13.4% compared to 2023. It is estimated that international tourist arrivals to Greece increased by 1.8% in 2025.

Domestic tourism continues to grow in Greece. In 2024, 9.8 million overnight domestic tourists were recorded in accommodation establishments (2.8% above 2023), accounting for 16.2% of total nights.

Tourism governance

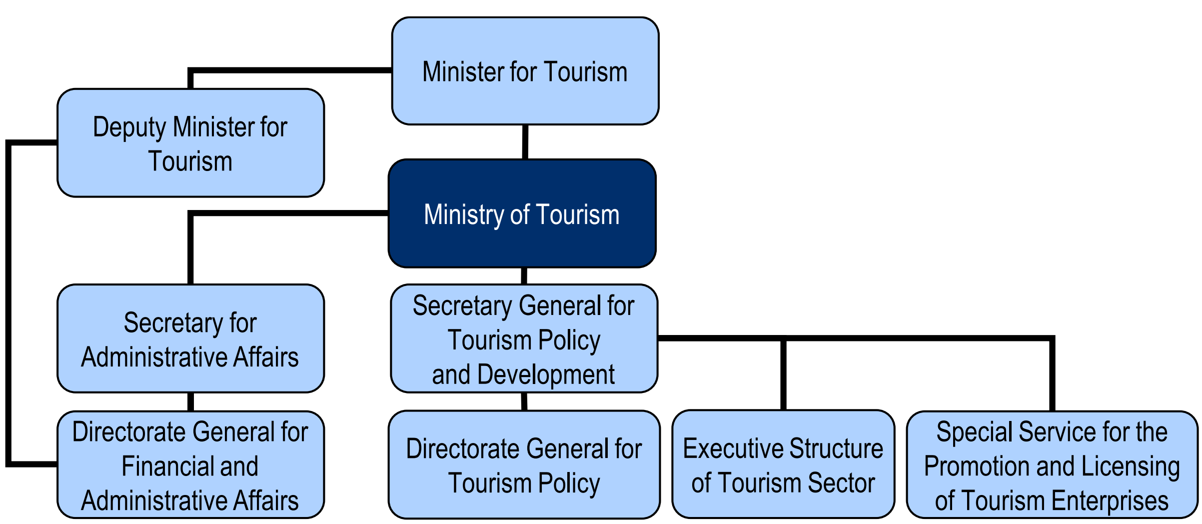
The Ministry of Tourism is responsible for Greece's tourism policy, international marketing strategy, legislative reform, tourism planning and national government co-operation. The Ministry also implements tourism education and training programmes to improve the quality and competitiveness of Greek tourism. The Co-ordination Service of the Ministry of Tourism monitors the implementation of the Annual Action Plan for tourism, which consists of the major legal/regulatory reforms and investments that promote the strategic aims of the Ministry.

The Greek National Tourism Organisation implements Greece's marketing strategy and operates a network of offices overseas. The Hellenic Chamber of Hotels, supervised by the Ministry of Tourism, is the Government's statutory advisor on tourism accommodation and the competent authority responsible for the official classification of main tourist accommodation. The Greek Tourism Confederation is the official body of the tourism private sector. It is actively involved in public dialogue and collaborates with State and regional authorities, to promote and facilitate investment opportunities and ensure the business competitiveness of the sector.

The Ministry of Tourism operates 14 Regional Tourist Offices responsible for licensing and quality control of tourism services and imposing administrative sanctions on tourism businesses. Local administrations (regions and municipalities) develop and implement programmes and activities for tourism development and promotion in the areas under their jurisdiction. All promotional activity is aligned with the national tourism promotion strategy. Compliant to Law 4875/2021, as amended and currently in force, Destination Marketing and Management Organisations can be created in Regions and Municipalities. Tourism promotion lies within the scope of their responsibilities, in co-operation with the Ministry and in accordance with the national tourism promotion strategy. Furthermore, and within the framework of the EU's Recovery and Resilience Facility, the Ministry of Tourism has proceeded to the creation of 19 local Management Destination Offices in regions and municipalities of Greece.

The budget for the Ministry of Tourism in Greece in 2025 was EUR 162.6 million. In 2025, the Greek National Tourism Organisation was granted EUR 15.8 million of this overall standard budget, supplemented by another EUR 14 million from the public investments programme. In 2024, this was EUR 13.2 million and EUR 17 million.

Greece: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Tourism, 2026.

Tourism policies and programmes

Tourism in Greece has been guided by annual action plans since 2020. The annual action plans focus on addressing what are considered to be the top three challenges to enhancing tourism resilience in Greece and leveraging opportunities from the green and digital transitions: (i) managing tourist flows and seasonality in flagship destinations, (ii) developing national tourism products, (iii) upgrading and modernising tourism education and training, and attracting and retaining the tourism workforce (see box below). The Annual Action Plan 2026 includes both short- and long-term programmes to enhance the competitiveness of the national tourism product, support investment, advance tourism education and training, and co-ordinate communication to promote the image of Greece abroad.

Greece considers destination management as the co-ordinated management of all aspects of a destination including its values, attractions, the people, infrastructure, access and marketing. To improve Destination Management and Marketing Organisation efficiency, Greece collaborated with the OECD within the context of the EU's Technical Support Instrument Tourism Flagship project, and with the support of the European Commission (SG REFORM), to understand possible legislative reforms and administrative initiatives. It has adopted the recommendation to form a Special Tourism Committee to reinforce co-operation among public and private sector stakeholders. Along the same lines, the Ministry of Tourism and the Ministry of Environment and Energy signed the 13983/15.07.2025 Joint Ministerial Decision to specify the criteria for the Model Tourism Destinations of Integrated Management.

In 2025, the Ministry of Tourism continued to implement targeted strategies to enhance the development and promotion of special forms of tourism. Within the broader national tourism policy, particular emphasis is placed on diversifying the tourism product and extending the tourist season, through the support and structured development of health and wellness (thermal) tourism, maritime/fishing tourism, gastronomy and agritourism, mountain tourism and domestic tourism. In addition, the Ministry of Tourism presented a comprehensive study that establishes the basis for a unified and inclusive national brand for agritourism and gastronomy. The project outlines strategic actions, quality standards, and digital tools that promote sustainable development, support regional communities, and enhance the visitor experience. As part of this effort, Greece's first National Thematic DMO, which is set to be completed in 2026, will focus on agritourism and gastronomy, linking local production with tourism and showcasing the authentic products, services, and experiences that make Greece unique.

To improve and better market the quality of tourism destinations and products, Greece has relied on quality labels. Existing quality labels have generally targeted the agritourism sector, focusing on, for example, wineries, breweries, olive mills, and cheese factories open to the public. New quality labels have been developed, such as "Accessible Tourism Destination" and "Accessible Tourism Enterprise", with the aim of promoting accessible tourism in Greece through the implementation of accessibility standards. Another quality label being developed is for 'Pet Friendly Tourist Accommodation'.

To improve tourism data and enable data-driven decisions and policymaking, Greece is working to compile the TSA. An EU-funded project for the compilation of Tables 1-7 was completed in April 2026, and work undertaken with the OECD and SG REFORM to compile the more complex Tables 8-10, was completed in mid-2025. This work was delivered with an action plan to strengthen tourism statistics and the TSA and provided guidance for the development of relevant indicators to measure and monitor tourism sustainability at regional and national levels. Greece is working to set up the National and Regional Observatories for Sustainable Tourism Development, which aims to highlight the comparative advantages of each tourism destination while ensuring environmental protection and cultural preservation. The observatories will collect and analyse data based on sustainability indicators at the national and local levels and promote evidence-based planning and development.

The "Tourism for All" programme, implemented by the Ministry of Tourism, continues as a targeted social policy measure to support domestic tourism and ensure equal access to travel opportunities for all citizens.

The programme provides financial subsidies in the form of digital vouchers to eligible Greek residents to subsidise tourist accommodation. The scheme particularly aims to stimulate off-season domestic travel, promote lesser-known destinations, and strengthen local economies, while contributing to social inclusion.

To address accommodation competitiveness in relation to short term rentals, the law 'New Quality, Safety, and Environmental Standards for Tourism and Rentals in Greece' establishes standards for short-term accommodation rentals (e.g. insurance, lighting, safety equipment, hygiene), streamlines tourism business licensing and reinforces tourism infrastructure oversight.

Enhancing the quality of education provided to the tourism sector workforce in Greece

The 2026 Annual Action Plan includes the following priorities: upgrading and modernising the framework for tourism education, considering the changing needs for sustainable tourism, and training as well as upskilling and reskilling the tourism workforce.

The Ministry of Tourism operates 13 educational units across the country: the Higher Schools of Tourism Education, the Schools of Advanced Vocational Training, and the Tourist Guide Schools. In addition, it annually implements Continuous Vocational Programs for professionals in the tourism sector, and in 2025 it carried out a reskilling and upskilling programme. In co-operation with national universities, the Ministry conducts intensive two-month training programmes for graduates of history and archaeology departments to expand the Registry of licensed tour guides.

The Ministry has worked to modernise the curricula offered in its educational units, introducing new and contemporary thematic areas such as sustainable tourism development, digital skills and more. At the same time, it offers its students seminars that complement the framework of tourism education provided, covering topics such as catering for individuals on the autism spectrum, for persons with disabilities, knowledge of first aid provision, combating workplace mobbing, and more.

To further upgrade the quality of studies, the Ministry seeks to enhance its visibility via establishing international bonds of co-operation through memoranda of understanding with well acknowledged schools and reputable tourism organisations.

Lastly, in response to the evolving needs of the tourism sector, the Ministry implemented a distance-learning training programme in 2025, funded by the EU's Recovery and Resilience Facility, with the aim to upskill and reskill both employees in the tourism sector and unemployed individuals. The initiative was particularly effective due to its asynchronous delivery model, achieving the participation and certification of 18 090 beneficiaries.

By removing the constraints of time and place, the programme ensured access to quality training even in remote islands, mountainous villages, and lesser-developed regions. It combined knowledge with opportunity, two key ingredients for a more equitable tourism landscape. The curriculum included core specialties, such as reception services and culinary/pastry arts, but also focused on the development of horizontal skills, such as digital competencies, health and safety at work, English terminology etc., providing participants with the tools they need to thrive in a competitive and increasingly demanding tourism economy.

Greece - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/q4u0r8

Hungary

Hungary: Key tourism messages 2026

Tourism direct GDP (2023)	Tourism direct employment (2024)	Travel exports (2024)
4.0% of total GDP (up 0.6 percentage points since 2022)	9.4% of total employment (up 0.5 percentage points since 2023)	20.7% of total service exports (down 0.4 percentage points since 2023)

National tourism strategy: National Tourism Strategy 2030

National tourism administration: Ministry for National Economy

National tourism budget: HUF 45 billion (2025)

Key tourism policy priorities and actions:

- *Supporting data-driven decision making* – The establishment of the National Tourism Data Supply Centre for accommodation establishments, catering units and tourist attractions to provide a starting point for data-driven management and future development.
- *Revising the tourism education system* – Modernising and enhancing teaching methods, training materials and educational content to meet contemporary standards.
- *Providing a quality experience for tourists* – Shifting the focus towards qualitative development in tourism including through the Tourism Bank and targeted financial support for beverage retailers operating in smaller settlements and engaged in hospitality activities.

Tourism in the economy and outlook

Tourism is a key sector of the Hungarian economy, expanding at a significantly higher rate than the national economy for many years. The sector represented 4.0% of GDP in 2023. Tourism is an important source of employment, providing 421 000 jobs in 2024 or 9.4% of national employment. Travel exports accounted for 20.7% of total service exports in 2024.

In 2024, tourism in Hungary reached record-breaking levels. Together, both domestic and international tourists accounted for more than 18.2 million total arrivals at all types of accommodation establishments. Of this figure, 8.9 million were international tourists, representing a 19.3% increase compared to 2023. International travel receipts reached HUF 2 945 trillion. The top three source markets across all inbound visitors in 2024 were Germany (10%), Romania (7%), and Poland (7%). International arrivals increased a further 12.0% in 2025. Furthermore, 9.4 million domestic overnight trips were recorded in 2024, representing a 6.2% increase compared to 2023. Domestic tourism expenditure accounted for 28% of total tourism expenditure in 2024.

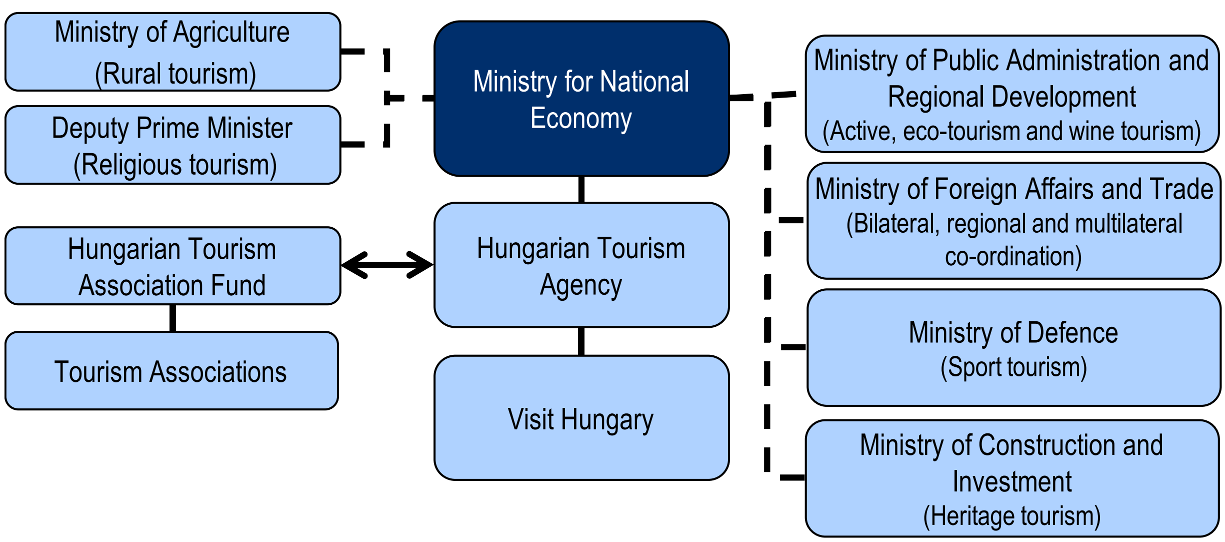
Tourism governance

The Ministry for National Economy is responsible for tourism policy in Hungary. The Ministry of Public Administration and Regional Development oversees active, eco-tourism, and wine tourism, while the Ministry for National Economy handles health tourism in co-operation with the Minister responsible for Health. Sport tourism lies with the Ministry of Defence, and heritage tourism falls under the Ministry of Construction and Investment. The Ministry of Foreign Affairs and Trade co-ordinates bilateral, regional, and international tourism.

The Hungarian Tourism Agency manages the tourism sector at both national and regional levels. The Agency is responsible for tourism strategy development, tourism product development and management, central marketing, international sales, communication campaigns, and the co-ordination of specific tourism initiatives through its subsidiary, Visit Hungary.

Work is underway to create a new destination management services network to ensure effective communication between local and central levels and within destinations, promoting a destination-based approach to product development and successful market entry. Led by the Hungarian Tourism Agency, the new model aims to implement unified management and support the co-operation of local stakeholders to achieve a shared vision for Hungarian destinations.

Hungary: Organisational chart of tourism bodies



Note: The chart reflects the structure as of April 2026. Following the forming of the new government, it may be subject to change.
Source: OECD, adapted from the Hungarian Tourism Agency, 2026.

Tourism policies and programmes

The National Tourism Strategy 2030 guides tourism policy and programme development in Hungary. The Strategy was revised in 2021 and again in 2023. The Hungarian National Tourism Strategy 2030 defines 12 guidelines, supported by four horizontal guiding principles: demand-centricity, a collaborative ecosystem, family-friendly tourism, and digital tourism.

The collaborative ecosystem promotes the concept of “co-living tourism,” which aims to improve the quality of life for both tourists and local residents, while also ensuring the preservation of natural resources. A typical example is the development of spa facilities, which improve the quality of life for locals, particularly as municipalities often provide them with discounted entry tickets. Digital tourism brings innovative solutions to the forefront, placing a strong emphasis on modelling and integrating the tourist-customer journey through data-driven decision making.

A key milestone in the development of digital tourism was the establishment of the National Tourism Data Supply Centre for accommodation establishments, catering units and tourist attractions (NTDSC - see box below). This system provides a stable foundation for the sector, serving as the starting point for data-driven management and future development. By focusing on sales and pre-booking data, the Data Supply Centre plays a prominent role in guiding marketing activities, marking the future direction of targeted promotion. Destination logic has also reached a new level with the creation of regional brands, which will be given even greater emphasis moving forward. Certain municipalities have created their own brands for local products. For example, the town of Mórahalom received the UN Tourism Best Tourism Villages award. The village has developed its own brand, Homokháti Portéka ("Products from the Sand Valley"), which promotes locally produced goods and regional identity. A National Active Tourism Strategy 2030 has also been developed to guide actions to increase the participation rate and frequency of active tourism and recreational activities among Hungary's population. The National Active Tourism Strategy serves as a guiding policy to create synergies between developing active tourism and ensuring the balanced and sustainable growth of this segment. It also provides a framework for co-ordinating a wide range of state and local government initiatives, as well as private investments, to mobilise active tourism development and ensure the efficient use of resources.

To support the digital and green transformation of the sector, Hungary is supporting tourism SMEs to develop their digital skills. The Hungarian Tourism Agency, under the authority of the Ministry for National Economy, organised workshops in each region, and free software "Vendégem" ("Guest") was provided to accommodation establishments, catering businesses, and tourist attractions. Vendégem, is a tool for tourism service providers that enables them to submit data directly to the National Tourism Data Supply Centre. As data reporting is mandatory in Hungary, this free software provides significant support for SMEs to manage their administrative and budgeting tasks.

To be eligible to use Vendégem, tourism businesses must meet specific criteria: accommodation establishments can have a maximum of 8 residential units and 16 rooms, while hospitality businesses and tourism attractions must demonstrate, through their annual business reports, that their net sales revenue ranges between HUF 12 million and HUF 50 million. Workshops were organised to guide business owners to use the software effectively. While video tutorials are available, these in-person sessions allowed participants to ask questions and receive practical guidance. Vendégem users also benefit from access to the NTDSC Compass (NTAK Iránytű), a platform that consolidates their data into daily, weekly, monthly, or annual summaries, providing clear insights into their operational performance.

Vendégem software for private accommodation providers includes a self-check-in feature, which greatly simplifies the process for both guests and hosts. By using self-check-in, tourists do not need to meet with the host in person, addressing a common logistical challenge in this segment of the market.

The tourism education system, including both secondary schools and universities, is being revised. Teaching methods are being modernised, and training materials and educational content are being improved. Key developments include: The largest university offering higher education in tourism has revised and updated its curriculum, making them more practice-oriented and aligned with international trends. Finally, a training programme for secondary school teachers has been designed and successfully piloted. The programme is scheduled for accreditation by the official education authority in the first quarter of 2026, after which it will be made available nationwide.

In recent years, Hungary has concentrated on enhancing its competitiveness primarily through quantitative achievements, including increasing international visitors. The country is on track to meet its numerical targets by the end of 2025. From 2026 onwards, the focus will increasingly shift towards qualitative development in tourism. Hungary has already introduced several measures for the qualitative improvement of tourism services. In the summer of 2025, Hungary established the Tourism Bank to provide favourable loan schemes to tourism enterprises, enabling them to expand, modernise and improve the quality of their services. Hungary launched a multi-stage grant programme at the beginning of 2025 to provide financial support to beverage retailers operating in smaller settlements and engaged in hospitality activities. From January 2026, the support schemes have been supplemented with loan programs, through which businesses can access funding in various forms. The pool of beneficiaries is expected to broaden with subsequent stages of implementation, promoting wide-scale quality development. Overall, these government initiatives contribute to the long-term goal of ensuring that tourists visiting Hungary can enjoy high-quality experiences and meaningful leisure time.

Hungary's National Tourism Data Supply Centre to support tourism management

The National Tourism Data Supply Centre (NTDSC) was established by the Hungarian Tourism Agency in 2019. The NTDSC system has undergone several developments since its inception, with the aim of making it as user-friendly as possible. Hungarian tourist service providers must use business software that is compatible with NTDSC's software. As data submission in the sector is mandatory, the Hungarian Tourism Agency developed a free software for small businesses to fulfil requirements. During the summer of 2025, both accommodation and hospitality businesses were interviewed regarding the use of Vendégem. A total of ten interviews were conducted, five with accommodation providers and five with hospitality businesses from the SME sector. Overall, feedback on the software was largely positive, although some constructive criticisms were raised. It is important to emphasise that free government software is intentionally not very user-friendly, because it cannot have a distorting effect on competition in the market.

One of its most important and beneficial features for hospitality providers and catering facilities, is the NTDSC Compass, an analytical platform developed to assist Hungarian tourism service providers in data-driven decision making. In response to the challenge of fragmented industry data, it consolidates real-time statistics from NTDSC and provides a wide range of valuable information to the stakeholders in the sector. Tourism businesses, as data providers, register information on various indicators, such as the number of guests, guest nights, and anonymised guest data (year of birth, country of residence, and city of residence), in the NTDSC system. On the Compass platform, data providers can review their own submitted data, with the system automatically generating charts and tables. This allows them to identify key insights, such as peak tourist seasons and the most popular services. The platform also supports marketing and service planning by helping businesses better understand their target groups and adapt services to meet guest preferences. A unique and useful feature of the NTDSC Compass is the ability for accommodation providers to compare their performance with three randomly selected anonymised businesses in their region, providing a clear perspective on their position in the local market.

Hungary - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/jambke

Iceland

Iceland: Key tourism messages 2026

Tourism direct GDP (2024)	Tourism direct employment (2024)	Travel exports (2024)
8.7% of total GDP (up 0.5 percentage points since 2023)	15.8% of total employment (equal to levels in 2023)	45.6% of total service exports (up 1.8 percentage points since 2023)

National tourism strategy: Tourism Policy and Action Plan until 2030

National tourism administration: Ministry of Industries

National tourism budget: ISK 2.4 billion (2025)

Key tourism policy priorities and actions:

- *Introducing a resource and infrastructure fee at publicly owned nature sites* – To support infrastructure, conservation and, in part, research and destination marketing.
- *Strengthening the framework for managing tourist destinations* – Including provisions for access and safety.
- Strengthening the governance of tourism – Clarifying the legal and institutional framework, including roles, responsibilities and co-ordination.

Tourism in the economy and outlook

Tourism is a key pillar of Iceland's economy and was the top foreign exchange-generating export industry in 2024. The sector directly contributed ISK 400 billion or 8.7% of the country's GDP in 2024 and accounted for approximately 32 840 jobs or 15.8% of the workforce, remaining relatively stable compared to 2023, where this number was 32 570. Travel generated ISK 448 billion in international receipts in 2024, equivalent to 45.6% of total service exports (43.8% in 2023).

Iceland welcomed 2.3 million international visitors in 2025, a similar number to 2024 (up 0.3%), and the top three source markets were the United States (29.2%), the United Kingdom (10.1%), and Germany (6.7%). In addition, around 330 000 cruise ship passengers visited Iceland in 2025, representing a 2.6% decrease from 2024.

Around 84% of the Icelandic population travelled domestically in 2025, a similar share as in recent years. In 2025, residents took on average 5.7 trips within the country, spending approximately 17 nights away from home in total.

The Icelandic Tourist Board's economic forecast model projects 2.22 million international tourist arrivals in 2026, a 2.2% decrease from 2025. A slight decline is expected to continue, with arrivals forecast at 2.20 million in 2027 and 2.19 million in 2028. There is considerable uncertainty regarding future cruise passenger numbers; however, current forecasts suggest around 301 000 passengers in 2026 and 272 000 in 2027.

Tourism governance

The Ministry of Industries is responsible for developing tourism policy and co-ordinating the work of governmental bodies in Iceland. The Department of Resources is the lead department and oversees the operation and performance of the Icelandic Tourist Board.

The Icelandic Tourist Board is responsible for implementation of government tourism policy, planning and support for regional development, licencing and monitoring of licenced activities, data collection, processing and presentation, safety, quality and consumer protection in relation to tourism, and administration of the Tourist Site Protection Fund and Route Development Fund.

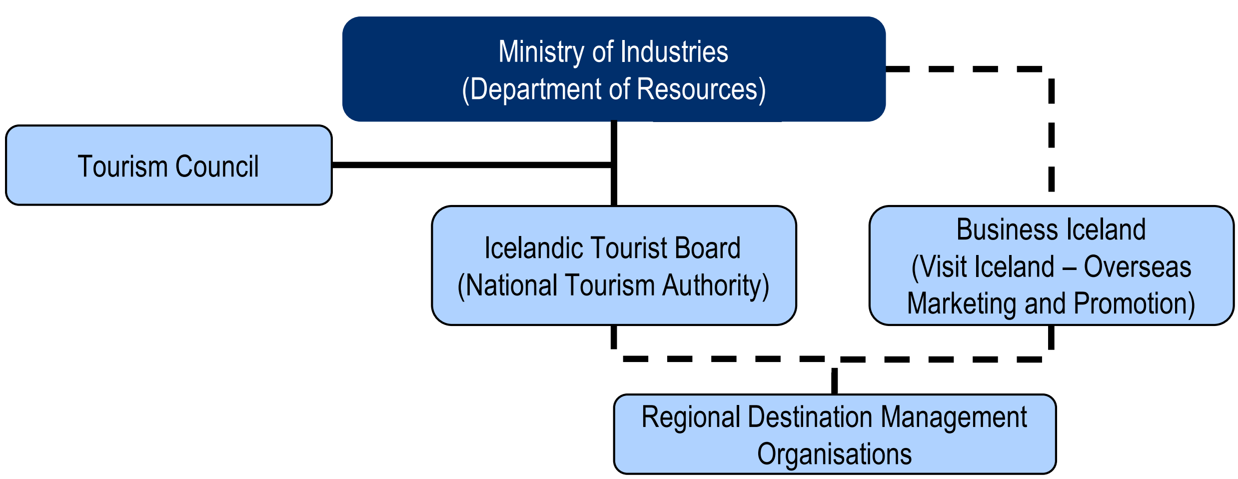
The Tourism Council serves as an advisory body to the Minister and is composed of representatives from the Ministries of Finance, Environment, and Infrastructure, as well the Icelandic Association of Local Authorities and the Icelandic Travel Industry Association.

Visit Iceland is the official destination marketing organisation. It is part of Business Iceland, a public-private partnership established to promote Icelandic exports, foreign direct investments and Iceland as a tourism destination.

Local municipalities are responsible for planning and management of many visitor attractions. With the support of the Icelandic Regional Development Institute, municipality associations operate development agencies to deliver tourism projects. DMOs in each region are public-private entities responsible for developing and implementing regional destination management plans and co-ordinating tourism priorities. They work in collaboration with stakeholders, including Business Iceland and the Icelandic Tourist Board, which provides financial support.

The general overall budget allocated to tourism in 2024 was ISK 2.2 billion. In 2025, this figure increased to ISK 2.4 billion, with the following breakdown: ISK 831 million to the Icelandic Tourist Board; ISK 523 million to the Tourist Site Protection Fund; ISK 823 million to tourism services and ISK 240 million to the Route Development Fund.

Iceland: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Industries, 2026.

Tourism policies and programmes

Iceland's Tourism Policy and Action Plan until 2030 aims to position the country as a leading sustainable tourism destination, fostering a profitable and competitive tourism sector in harmony with nature and society. The plan is organised around the four main guiding principles of Economy, Society, Visitors and Environment. ISK 1.2 billion from the general budget has been secured for implementation of the Plan through 2030.

To promote value creation, safety and visitor management in tourism, the Icelandic Government plans to introduce a resource and infrastructure fee at publicly owned nature sites, with a bill expected to be presented in autumn 2026 and implementation envisaged in 2027. The fee is intended to support the development, maintenance and conservation of destinations, while also contributing, in part, to research and destination marketing at the national level. In parallel, work is underway to strengthen the governance of tourism, including a clearer legal and institutional framework, defined responsibilities and improved co-ordination.

Managing unbalanced tourism distribution and pressure remains a key priority for Iceland, with some destinations at times perceived as overcrowded, while others would benefit from increased visitation. In this context, provisions are being developed to better manage access, safety and site-specific conditions at tourist destinations, including planning and risk management considerations.

There is also a push for more innovative and sustainable development of tourism businesses, with the Icelandic Tourism Cluster leading new initiatives to build the capacity of SMEs (see box below).

Empowering tourism SMEs through innovation and regenerative development

Strengthening innovation and sustainability capacity among tourism small- and medium-sized enterprises (SMEs) is a central challenge for Iceland. These businesses often lack access to resources, funding or knowledge to develop new products, or to adopt circular and regenerative approaches, despite growing expectations around climate responsibility, digital development, and social value creation.

Iceland's Tourism Policy and Action Plan until 2030 places a strong emphasis on innovation, capacity-building, and collaboration. It calls for more co-ordinated support for tourism SMEs in developing scalable, sustainable solutions and integrating them into broader innovation frameworks. In line with these objectives, the Icelandic Tourism Cluster has led several initiatives to help foster this necessary transformation, including:

- Ratsjáin (The Radar) is a national competence programme designed and implemented in 2025. It supported 58 SMEs to enhance sustainability performance through coaching, peer learning, and the development of tailored strategies.
- The Nordic Regenerative Tourism Project works across six Nordic countries to co-create tools such as the First Mile method, citizen science engagement models, and a regenerative evaluation matrix. These tools aim to embed regenerative principles into both tourism business models and public planning.
- Funding and technical support was provided to 18 Icelandic SMEs help to adopt circular economy and regenerative practices as part of the EU-funded CE4RT programme.

These Cluster-led projects contribute directly to the objectives of Iceland's tourism policy and illustrate how collaborative platforms can accelerate sustainable transformation in tourism, particularly among SMEs.

Iceland seeks to strengthen tourism education at all levels and is expanding access to learning opportunities. A recent review of tourism education programmes highlighted the need for a more coherent system, better alignment with industry needs, and clearer education pathways. Planned actions also emphasise multicultural awareness and inclusion, alongside the development of work-based learning opportunities.

Tourism is also managed through Destination Management Plans for each of Iceland's seven regions. The Plans are joint policy statements intended to steer growth and development that define the roles and responsibilities of stakeholders and outline the resources necessary to carry out their responsibilities.

Iceland - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/bapzkg

Ireland

Ireland: Key tourism messages 2026

Tourism direct GDP (2019)	Tourism direct employment (2022)	Travel exports (2024)
4.4% of total GDP (no historic data)	11.7% of total employment (up 3.4 percentage points since 2021)	1.5% of total service exports (down 0.2 percentage points since 2023)

National tourism strategy: A new Era for Irish Tourism, National Tourism Policy Statement

Responsible government agency: Department of Enterprise, Tourism and Employment

National tourism budget: EUR 276.1 million (2026)

Key tourism policy priorities and actions:

- *Spreading the benefits of tourism* – Focusing on the development of less mature destinations, utilising the Regional Experience Brands through Destination Experience Development Plans to increase visitor numbers in less mature and emerging regions within Ireland by 7% annually.
- *Growing tourism revenue* – The target is for overseas and domestic revenues combined to increase from EUR 9.6 billion in 2024 to EUR 14.8 billion by 2031, through the growth of overseas tourism revenue to EUR 9 billion and domestic tourism revenue to EUR 5.8 billion.
- *Accelerating Digital and AI Transformation* – Continuing to power the digital transformation of tourism businesses through the ‘Digital that Delivers’ Programme. Having at least 90% of tourism-related SMEs adopting advanced digital tools by 2031.

Tourism in the economy and outlook

Tourism provides a significant contribution to Ireland in both economic and social terms. In August 2024, there were 228 800 employed in tourism industries in their primary employment, which represented 9.1% of total employees. This was up from 223 200 in August 2022. Travel exports accounted for 1.5% of total service exports in 2024, a 4% increase in nominal terms compared to 2023.

In 2024, there were 6.6 million overseas visitors to Ireland, an increase of 5.3% compared to 2023. The top international markets were the United Kingdom, the United States and Germany. In 2025, international arrivals decreased by 2.8% to 6.4 million. Ireland aims to increase overseas tourism revenue to EUR 9 billion (excluding carrier fares) by 2031, an increase of 50% on the 2024 level.

Domestic tourism continues to thrive, with 16.6 million domestic overnight visitors and 36.7 million domestic visitor nights in 2024, an increase of 15.8% and 8.2% on 2023, respectively. The total value of domestic overnight trips by residents in Ireland was estimated at EUR 3.6 billion, with an aim to increase this figure to EUR 5.8 billion by 2031.

Tourism governance

The Tourism Division of the Department of Enterprise, Tourism and Employment sets national tourism policy in Ireland, providing strategic direction to support sustainable growth of the sector. Fáilte Ireland operates under the remit of the Department to administer national tourism policy. Tourism Ireland CLG is under the remit of the North South Ministerial Council and supports the Department's tourism objectives as outlined in its tourism policy.

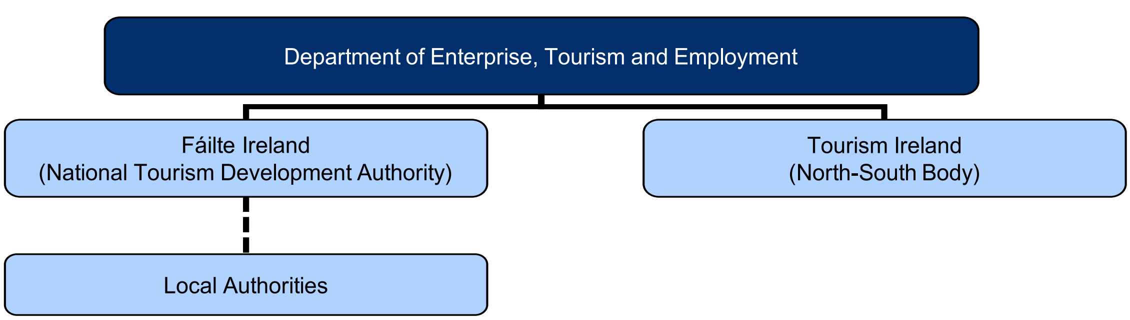
Fáilte Ireland is the National Tourism Development Authority. It supports tourism businesses to better manage and market their products and services, and to develop experiences in line with Fáilte Ireland's brands. It works with other state agencies and representative bodies at local and national levels. The Authority is responsible for promoting Ireland as a domestic holiday destination and managing a network of tourist information centres throughout the country.

Tourism Ireland CLG is responsible for marketing the island of Ireland as a holiday and business tourism destination overseas. It is funded by the Department for the Economy, in Northern Ireland, and by the Department of Enterprise, Tourism and Employment, in Ireland.

Local authorities play a key role in planning and delivering services and infrastructure essential to tourism, including investment in attractions, maintenance of public spaces and environmental assets, and the provision of public facilities. All local authorities have dedicated tourism officers who support strategic planning, stakeholder engagement and the implementation of local tourism initiatives. The Parent Department for Local authorities in Ireland is the Department of Housing, Local Government and Heritage. There are 31 Local authorities in Ireland and they co-ordinate their activities through the City and County Managers Association. At local level, Fáilte Ireland adopts a collaborative approach, undertaking extensive consultation with industry, local authorities, and communities during the development of Destination and Experience Development Plans, helping to foster co-ownership and alignment with local priorities.

Tourism was allocated EUR 276.1 million under the 2026 budget. This funding supports Tourism Ireland's overseas marketing campaigns, regional access schemes and Fáilte Ireland's work in destination development, tourism careers, and home holiday promotion. It also includes capital funding for new attractions, sustainability initiatives, and marketing research.

Ireland: Organisational chart of tourism bodies



Source: OECD, adapted from the Department of Enterprise, Tourism and Employment, 2026.

Tourism policies and programmes

The *New Era for Irish Tourism, National Tourism Policy Statement* outlines Ireland's strategic direction for tourism to 2031. Established in December 2025, the overall objective of the Tourism Policy Statement is to ensure that the tourism and related sectors support the broader goals of Government, including climate action, digital transformation, competitiveness, market diversification and balanced regional development.

It sets out a vision to grow the economic contribution of tourism to the Irish economy, strengthen regional development, and ensure that the tourism sector remains resilient, inclusive and sustainable, with a strong emphasis on supporting SMEs across all regions. It addresses capacity constraints in the market including on accommodation, visitor access, skills and access to finance.

Some of the key policy commitments in the National Tourism Policy Statement include:

- Grow strategic source markets and visitors by deepening and defending the North American and Great Britain markets, and growing and diversifying European, Gulf and Asian markets. This will include increasing Tourism Ireland resources in those markets and supporting new connectivity through a new Strategic Air Access Programme.
- Develop a balanced spread of tourism throughout the country, prioritising investment in less-developed tourism regions. Destination Experience Development Plans will be established for all areas, with local tourism enterprises maintaining a central role in the development of these five-year plans. Regions in the Midlands areas will be further aided by support from the EU Just Transition Fund, as they transition away from industrial peat harvesting.
- Enhance seasonal distribution through a focus on initiatives that provide year-round attractions for visitors including investing in festivals such '*Home of Halloween'* and strengthen linkages and strategic partnerships in the development of tourism products.
- Accelerate the delivery of all-island product development and promotion through Tourism Ireland and Shared Island funding and develop new tourism opportunities, presented by the construction of the Narrow Water Bridge, and existing attractions such as Wild Atlantic Way and Causeway Coastal Route, the Cuilcagh Lakelands UNESCO Global Geopark and Sliabh Beagh.
- Support our tourism-related SMEs to grow and scale to compete on the domestic and international markets. Ireland will work to improve awareness of the range of supports available to food and beverage enterprises and activate a suite of specific supports for these enterprises including to grow competitiveness, skills, support the digital transformation, and to drive sales, profitability and resilience. Initiatives to improve access to finance for the sector will also be progressed.
- Promote sustainable business practices all along the tourism value chain to ensure tourism plays its part in achieving our national climate and biodiversity targets and investing in amenity and nature restoration including through the Just Transition Fund.
- Review all tourism data sources to identify gaps to be addressed and develop enhanced sets of indicators on performance and outcomes for the tourism sector.

The Statement is supported by more targeted plans, including the Tourism Sectoral Adaptation Plan 2025-2030 and the Business Events 2030 Strategy. The Tourism Sectoral Adaptation Plan 2025-2030, launched in November 2025, seeks to identify the challenges and opportunities presented by a changing climate, with the aim of maintaining Ireland's appeal to holidaymakers and supporting resilient communities through employment and economic growth. It sets three key goals to increase the understanding of, and build shared awareness around, climate change and tourism, while working to reduce the consequences. The Adaptation Plan also contains specific actions to achieve these goals.

The Business Events 2030 Strategy, launched in April 2025, aims to promote Ireland as a premier global destination for conferences, meetings, and incentive travel to drive 8% average annual revenue growth for the business events sector. The Strategy focuses on attracting high-value business events, fostering sustainable development, creating long-term careers, and promoting regional tourism.

Ireland continues to support tourism SMEs to adopt digital technologies, improve digital accessibility and support AI adoption. In 2026, an additional 265 businesses will complete digital transition journeys, with 700 tourism SMEs supported by the Digital that Delivers and Just Transition Digital Transformation programmes since 2022. A new Tourism Digital Transition Plan, scheduled for delivery in 2026, will broaden the range of supports to include innovative technologies along the tourism value chain. The Plan aims to unlock cost efficiencies, boost productivity, and strengthen competitiveness across tourism business operations, while also enhancing the visitor experience. To accelerate AI adoption, an innovation partnership will be established with the European Digital Innovation Hubs, including the Common European Data Spaces and Robust AI for Transparent Public Governance initiative. This collaboration will drive innovation pilots and explore opportunities to co-develop generative AI tools for tourism SMEs.

Ireland is committed to becoming a leading accessible and inclusive tourism destination by 2030. The Access for Success Initiative, launched in March 2025, is an industry-focused programme designed to embed inclusive practices across hotel operations. A key milestone is the active participation of 67 Accessibility Champions within hotels nationwide, who are undertaking accessibility audits, engaging in specialist training, and developing Access Welcome Guides to ensure that every guest experiences a genuinely inclusive and supportive environment. This supports hotels to unlock new market opportunities, improve service delivery, and build long-term resilience while enhancing Ireland's reputation.

The long-term sustainable growth of tourism also requires adequate accommodation and an improved balance between the short and long-term rental sectors. Achieving this balance will require enhanced regulation of short-term rentals (see box below). A new Tourism Accommodation Strategy is being designed to help guide the development of the right blend of tourism accommodation options in all areas, particularly in less mature destinations. The aim is to ensure Ireland has sufficient and fit-for-purpose tourist accommodation stock, with new development underpinned by a strategic and planned approach.

The Regional Cooperative Access Scheme aims to enhance tourism accessibility and support regional development. It provides funding to encourage new access opportunities and maximise the potential of existing services to the regions. This scheme is part of a broader effort to promote regional air and sea access to Ireland in overseas tourism markets, supported by matched funding from airlines, sea carriers, airports, ports, and regional tourism stakeholders.

Regulating short-term rentals in Ireland

The short-term rental market is estimated to have grown by 26% between October 2022 and October 2025, based on data scraping from the four largest online booking platforms operating in the Irish market. As of October 2025, there were approximately 34 020 short-term accommodation properties listed. This estimated growth, reflecting the increasing role of short-term rentals as a provider of tourism accommodation, has impacted the supply of long-term residential housing, particularly in urban areas, resulting in a range of social and economic effects.

The Irish Government has approved the introduction of legislation to substantially strengthen the regulation of the short-term rental sector in Ireland, with the aim of increasing the availability of long-term (residential) housing in areas of high demand during a period of sustained housing pressure. The regulatory controls will include the establishment of a national register for short-term letting, with all short-term accommodation providers required to be registered by 31 December 2026. These measures will also support compliance with the Short-Term Rental Regulation (Regulation (EU) 2024/1028) on data collection and sharing relating to short-term accommodation rental services, adopted in April 2024 and applicable from 20 May 2026.

Ireland - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/fd8yl6

Israel

Israel: Key tourism messages 2026

Tourism direct GVA (2023)	Tourism direct employment (2023)	Travel exports (2024)
1.9% of total GVA (0.1 percentage points since 2022)	3.3% of total employment (up 0.1 percentage points since 2022)	2.7% of total service exports (down 3.7 percentage points since 2023)

National tourism strategy: 2030 Strategic Plan

National tourism administration: Ministry of Tourism

National tourism budget: ILS 522 million (2025)

Key tourism policy priorities and actions:

- *Developing human capital for tourism* – Strengthening tourism education at the high school level through internships to cultivate early interest and expertise in sustainable and accessible tourism.
- *Advancing data-driven decision making and strategic capacity* – Establishing unified national tourism data infrastructure to make data more accessible while drawing on improved surveys and bank transactions data to improve data.
- *Increasing tourism volume and revenue* – Multiple measures have been put in place to expand new and existing markets, target faith-based tourists and boost domestic tourism.

Tourism in the economy and outlook

The tourism sector has been severely affected by the terrorist attacks of 7 October 2023, with an almost complete halt in inbound tourism during the first months of the war and a significant decline in hotel revenues and employment.

Domestic tourism remains a key stabilising factor for the sector, providing economic resilience during downturns. In 2023, 6.6 million domestic tourist trips were undertaken at commercial establishments, below the level of 8.2 million in 2019. There were 23.8 million domestic bednights in 2024, an increase of 37% compared to 2019.

Forecasts indicate that under a moderate growth scenario, inbound tourism could reach 7 million visitors by 2030, generating significant gains in employment, investment, and foreign exchange earnings. Under current airport capacity, the maximum number of inbound tourists is estimated at around 6 million per year by 2026–2027.

Tourism governance

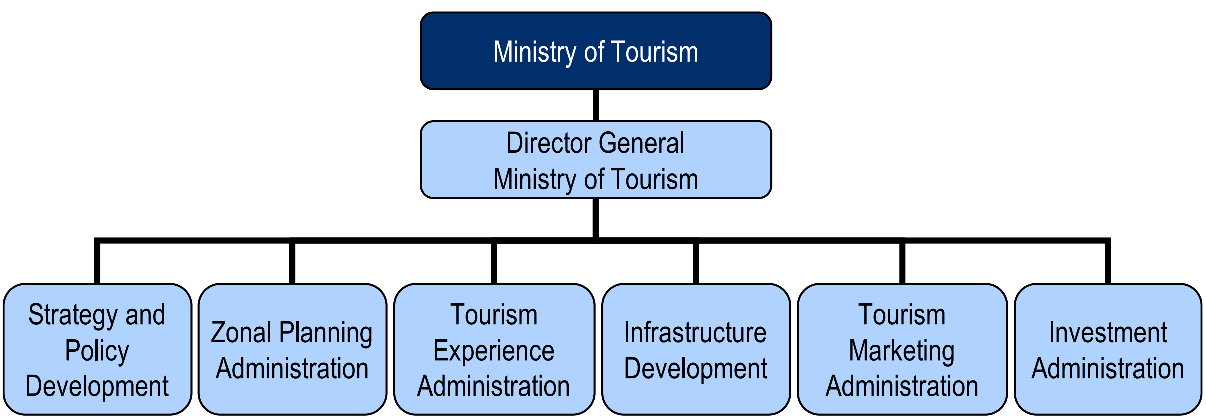
The Ministry of Tourism is the national government entity responsible for steering tourism policy and the sector. The Ministry continuously engages with all parts of the tourism sector, with particular emphasis on emergency support programmes for hotels and inbound tour operators and preparing SMEs for the recovery of domestic and inbound tourism. The Ministry co-operates with other relevant ministries, authorities, and agencies on an ad-hoc basis and within the framework of joint steering committees.

Major municipalities, or regional authorities of tourism with significant administrative capacity, financial resources, and independent tourism departments (such as Jerusalem, Tel Aviv–Yafo, Eilat, or Haifa), usually co-ordinate tourism policies and marketing activity with those at the national level. Smaller, mainly rural authorities, tend to cluster into regional tourism DMOs to develop more coherent products and enable more effective branding and marketing opportunities. The Ministry has a close working relationship with regional DMOs and tourism departments, and co-ordinates marketing, product development and regional branding.

The Ministry also assists local authorities in tourism development research and feasibility studies, especially for infrastructure development and zoning. The Ministry organises professional coaching and training programmes in product development and marketing for SMEs, with the active participation of regional DMOs.

For 2025, the State Budget allocated approximately ILS 522 million to the tourism sector, including around ILS 130 million for public tourism infrastructure development.

Israel: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Tourism, 2026.

Tourism policies and programmes

The Ministry of Tourism's 2030 Strategic Plan outlines clear goals, targets, metrics, key challenges, and the main actions required to achieve them. At the heart of the strategy is a customer-centric approach, focusing on both domestic and inbound tourists, and enhancing the way the government and tourism sector interact with visitors.

A key priority under the Strategic Plan is to increase tourism volume and revenue by expanding international visitors in new and existing markets, boosting domestic tourism and targeting faith-based tourists, while seeking to maximise the economic impact of these visitors. The Strategic Plan identifies enhancing tourism accessibility for all, including persons with disabilities and elderly travellers, as a particular opportunity. This involves adapting sites and services to meet accessibility standards, including public transport, accommodations, and tourist attractions.

Two programmes are now available to support more accessible infrastructure in Israel. The Accessibility Budgeting Procedures for Tourist Sites 2024-2025 allocates ILS 20 million to improve accessibility in previously funded tourist sites. It supports upgrades such as accessible paths, signage, and facilities, as part of the Ministry's policy to promote "Accessible Tourism". The second programme, Public Tourism Infrastructure Development Procedure 2025 (ILS 130 million), is designed to help develop diverse, competitive and sustainable tourist products by supporting new tourism infrastructure. Projects will be considered based on their integration with the environment, protection of natural resources, and accessibility, while addressing social and cultural aspects that affect the community in the development area.

Other initiatives support diverse and sustainable tourism in Israel, with a focus on protecting and promoting cultural heritage, assessing the environmental impact of tourism development as part of the project planning process, spreading the benefits of tourism geographically, and encouraging domestic tourism to reduce reliance on international travel fluctuations.

Israel is actively working to improve the visitor experience, from arrival to departure. The goal is to ensure that visitors feel their journey was smooth, enjoyable, and represented good value for money. Key initiatives include improving service quality at key "touchpoints" in the tourist journey, boosting site maintenance and cleanliness, developing materials to make information more accessible, monitoring tourist satisfaction in real time and adjusting services accordingly, and removing outdated regulations to align with international standards.

Israel is actively supporting accommodation expansion and regional diversification. Since 2010, over 240 hotels have benefitted from various government grant programmes. Currently, a grant support provides up to 20% capital grants for new hotel construction or expansion projects across the country (excluding Tel Aviv and Herzliya). The budget for these incentives was ILS 180 million in 2025, with a similar allocation expected for 2026.

In response to the ongoing geopolitical situation in Israel, the Government has implemented targeted financial support and recovery measures, including grants, soft loans, and tax relief for tourism enterprises, particularly in hospitality and travel services. While inbound tourism is expected to recover gradually, domestic tourism continues to provide resilience, and the Ministry's 2030 Strategy remains focused on sustainable growth and diversification.

An intelligent and resilient foundation for developing long-term tourism policy relies on advancing data-driven decision making and strategic capacity. Israel is now embedding data into decision making, aligning strategic priorities across departments, and working to ensure organisational readiness in times of crisis. This involves:

- Establishing a unified national tourism data infrastructure and a strategic roadmap to guide investment, marketing, and planning decisions.
- Conducting market research and analytics, including the 2025 Inbound Tourism Survey and reports on tourist credit card spending to assess economic impact.
- Driving innovation and regulatory streamlining, including the rollout of digital platforms to simplify internal workflows, reduce bureaucratic barriers for investors, and accelerate approval processes across planning and tourism development.
- Strengthening Israel's international positioning through bilateral tourism agreements and participation in global tourism projects.
- Improving crisis preparedness, with a national emergency operations manual for the tourism sector and readiness assessments in key municipalities.

A thriving tourism sector depends not only on hotels and attractions, but on the people who deliver the experience. To develop human capital across the tourism ecosystem, Israel is investing in professional development, workforce expansion, and long-term education opportunities. To improve the skills and quality of the workforce, training and licensing programs are being expanded for tourism professionals. Updated curricula and certifications are being launched to reflect evolving industry standards and national strategic needs. Tourism education is also being promoted in both high schools and academia, to cultivate early engagement with tourism as a career path and to embed service excellence, multilingual capabilities, and cultural fluency in future professionals. The Ministry of Tourism, in collaboration with the Ministry of Education, leads these programmes which currently offer three specialised tracks: hotel management, tourism management, and digital tourism. In alignment with the goal of fostering digitalisation, innovation, and entrepreneurship to transform tourism, the digital tourism track emphasises the integration of AI and direct collaborations with Israeli startups, providing students with practical exposure to the latest advancements in travel-tech. Schools collaborate with local tourism businesses to offer internships and hands-on projects, bridging classroom learning with real-world applications. These partnerships foster skills relevant to green tourism, digitalisation, and inclusive service provision. Critical labour shortages, particularly in the hotel sector, are being addressed by reallocating and utilising foreign worker quotas through bilateral agreements.

Understanding the economic impact of public tourism infrastructure in Israel

Israel has identified optimising public investment in tourism infrastructure to maximise economic and social returns as a key priority. Public tourism assets such as visitor centres, parks, and accessibility upgrades require substantial funding, with the Ministry investing approximately ILS 150 million annually to develop public tourism infrastructure, in collaboration with local authorities. Previously there was limited data on the cost-effectiveness and economic impact of these investments, hindering evidence-based decision making and efficient allocation of resources.

To better understand the impact of public tourism infrastructure, Israel developed models to define indicators and measure the impact of investment in different types of tourism infrastructure. The *Economic Effectiveness Research Program* evaluates the return on investment of existing and planned public infrastructure projects, assessing the expected impact on tourist spending, job creation, regional development, and social inclusion. The methodology combines quantitative data including visitor numbers, revenue growth, employment figures, with qualitative assessments like visitor satisfaction and accessibility improvements. The research outputs directly inform infrastructure planning and budget prioritisation, ensuring funds target projects with highest economic and social benefits.

Social benefits such as improved accessibility, community engagement, and equitable regional development are integrated within the model as key indicators. In addition, Israel's model enables the prioritisation of specific tourism regions, such as the North or the South, and allocates financial, logistical, infrastructural, and social resources accordingly, to promote balanced regional growth and inclusiveness.

Israel - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/7sat1i

Italy

Italy: Key tourism messages 2026

Tourism direct GVA (2023)	Tourism direct employment (2023)	Travel exports (2024)
5.4% of total GVA (down 0.8 percentage points since 2019)	8.5% of total employment (down 0.3 percentage points since 2019)	37.9% of total service exports (up 0.2 percentage points since 2023)

National tourism strategy: Strategic Tourism Plan 2023-2027

National tourism administration: Ministry of Tourism

National tourism budget: EUR 340 million (2025)

Key tourism policy priorities and actions:

- *Promoting sustainable and balanced tourism development* – Diversifying destinations and redistributing visitor flows to lesser-known areas to ease pressure on major sites, support more even economic benefits, and reduce seasonality.
- *Advancing the digital and green transition of the tourism ecosystem* – Strengthening digitalisation through the Tourism Digital Hub and promoting resource-efficient, low-impact tourism models aligned with EU Green Deal objectives, including soft mobility.
- *Enhancing workforce quality and competitiveness* – Investing in specialised training across tourism sectors and reinforcing professional standards, particularly for tourist guides, to raise service quality and attract skilled talent.

Tourism in the economy and outlook

Tourism is an important driver of economic development in Italy and has recovered strongly in recent years. The sector directly accounted for 5.4% of GVA and employed 2.1 million people in 2023, contributing 8.5% of total employment. In 2024, travel exports represented 37.9% of total service exports, approaching the pre-pandemic levels of 40.5% and a slight increase compared to 37.7% in 2023.

In 2024, Italy received 57.7 million inbound tourists, an increase of 0.8% compared to 2023. International visitors spent almost 381 million nights, down 0.6% compared to 2023. The top three international source markets by overnight arrivals were Germany (17%), United Kingdom (11%) and France (11%). It is estimated that international arrivals increased by 6.3% in 2025.

Domestic tourism is an important part of the Italian tourism sector, with 38.0 million overnight domestic trips in 2024, a decrease of 7.5% compared to 2023.

Tourism governance

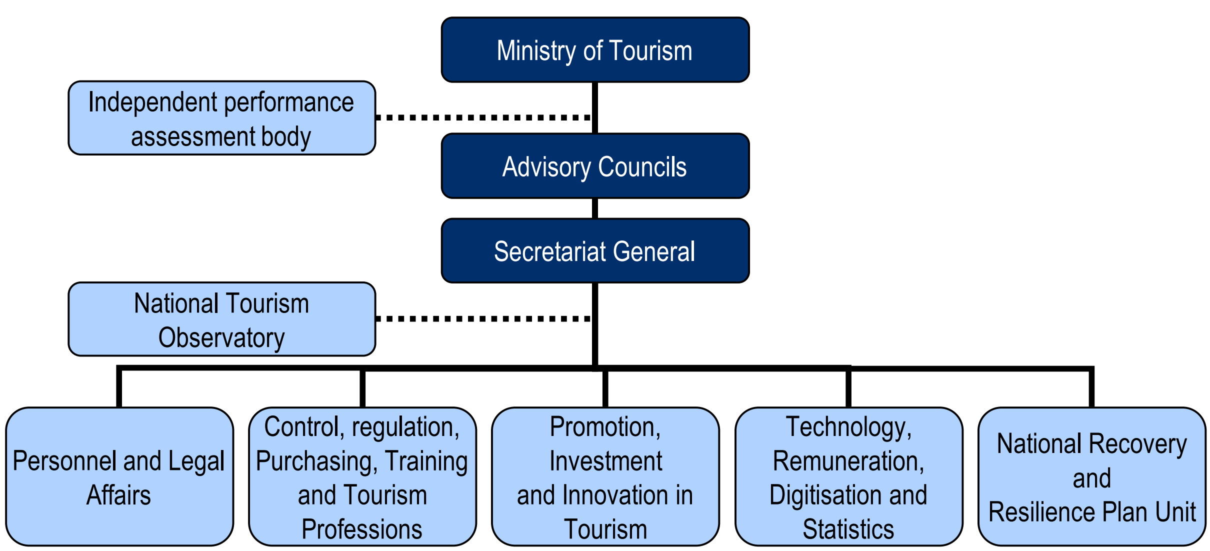
The Ministry of Tourism plays a leading role in strategic planning, policy co-ordination and innovation, including national strategic co-ordination, implementation of development plans, promotion of initiatives to improve the tourist offer and planning of tourist assistance mechanisms. The Ministry underwent a re-organisation in 2024 with the aim to create a stable, transparent and modern structure with strengthened efficiency, operational capacity and the ability to respond strategically to tourism sector challenges.

The Ministry supports and supervises the National Agency for Tourism (ENIT), which oversees the promotion and marketing of the national image and brand, and collaborates with the Italian Alpine Club (CAI), responsible for the promotion of mountaineering, conservation and study of the Italian Alps. The National Agency for Tourism actively collaborates with tourism stakeholders through regular meetings to continuously improve the sector.

The Italian Constitution attributes several key competences to the regions. However, central and regional authorities co-operate through agreements, institutional co-ordination mechanisms and planning instruments, jointly exercising regulatory powers on numerous issues concerning tourism. Each region has the legislative authority to adopt three-year plans with annual programs that outline responsibilities, goals and guidelines for tourism management. Strategic collaboration between central authorities and local institutions is co-ordinated through the Unified Conference.

The State budget for tourism policy measures provides EUR 777.5 million through 2027, of which over EUR 340 million was allocated for 2025. More than EUR 152 million has been refinanced for special supplementary allowances related to night and overtime work in the tourism, hospitality and restaurant sector, and EUR 110 million has been allocated for development contracts, aimed at supporting growth and innovation in the tourism supply chain.

Italy: Organisational chart of tourism bodies



Source: OECD, adapted from the Italian Ministry of Tourism, 2026.

Tourism policies and programmes

The Strategic Tourism Plan 2023–2027 guides Italy's tourism development through five pillars: governance, innovation, quality and inclusion, training and careers, and sustainability. It provides a long-term, structured industrial strategy focused on quality and competitiveness, supported by targeted investments, including the National Recovery and Resilience Plan. Through the Revolving Fund for Enterprises, EUR 1.38 billion has been allocated in grants and subsidised loans to upgrade tourism services and facilities while promoting digitalisation and sustainability.

A key tool for sustainable tourism development is the Tourism Digital Hub (TDH), a multichannel platform with a dual purpose: enhancing the visitor experience through simple, integrated, high-quality access to national tourism services, principally via italia.it, and supporting operators with innovative digital tools for professional development and continuous skills improvement.

Italy is strengthening its role in international tourism governance. In 2024, it hosted the first G7 Tourism Summit, bringing together G7 ministers and representatives from the EU, OECD and UN Tourism. The meeting concluded with the Florence Declaration, defining shared strategic priorities for global tourism.

Improved institutional co-ordination has also supported regulatory reforms. The Reform of the Tourist Guide Profession (December 2023) introduced a standardised national framework for licensing and practice to ensure quality, transparency, merit-based access, skills development, and cultural heritage protection. Key measures include: a national list of tourist guides, a national qualification exam, a digital platform for guides, and continuing education through thematic and geographical specialisation courses. A tutor system for guides from EU/EEA countries and Switzerland supports international integration, with over 330 tutors registered by September 2025.

Italy is investing in tourism workforce development through the Tourism Training Fund, which launched two calls: one for free training courses in hospitality, wellness, and food & beverage; and one to establish the National Strategic Centre for Higher Education in Tourism, an academic-professional ecosystem offering master's programmes, advanced training, and excellence courses in collaboration with universities, ITS, research centres, and businesses. A complementary Tourism Professions Portal is under development, providing support for training, job matching, and transparency across four areas: Professions, Work, Training, and Events/Communication.

To attract and retain workers, Italy expanded in 2025 the tax exemption on tips from 25% to 30% and raised the income threshold for eligibility from EUR 50 000 to EUR 75 000.

In 2025, Italy also introduced the "Staff House" programme (EUR 120 million for 2025–2027) to create housing for seasonal workers in high-demand destinations.

Established in 2022, the Unified National Tourism Fund remains the main instrument for co-ordinating and financing national tourism policy. It supports both operational measures, such as events, promotion, and initiatives, and capital investments in tourism infrastructure. Its 2025 priorities include extending the tourism season, boosting business tourism and Made in Italy excellence, and promoting sports and cultural tourism, while advancing environmental, social, and economic sustainability. Digital innovation and AI are considered key levers to improve accessibility and overall service quality.

Italy is also developing a National Nautical Tourism Strategic Development Plan aiming to address promotion, infrastructure needs, regulatory frameworks for port use, financing and investment, and training.

Creating an official digital ecosystem in Italy

Italy has created the Tourism Digital Hub (TDH) to connect tourists and operators and to build a unified national digital tourism ecosystem. It addresses structural gaps and provides an institutional tool that engages all stakeholders and offers a reliable source of information by:

- Standardising Data: Collecting, organising, and harmonising fragmented data on attractions, services, and tourist flows from regional and private sources to support evidence-based policymaking and data-driven destination management.
- Centralising Information: Offering a single, reliable source that complements and interoperates with diverse local platforms.
- Boosting Competitiveness: Using digital tools to improve tourism quality and strengthen the global visibility of Italian destinations.

For tourists, the TDH provides updated, personalised, and easily accessible information through real-time data integration, acting as a secure and trustworthy portal. All operators on the platform are verified through the Italian Chamber of Commerce, and all accommodation providers must hold a National Identification Code, a new measure to improve transparency in accommodation and short-term rentals.

Accreditation also covers extra-hotel operators and individual tourist guides, whose information is verified through the National Register of Tourist Guides and the National Database of Accommodation Facilities to ensure accuracy and compliance.

To support professionals, the Operators' Portal offers a dedicated digital space for accredited operators, providing services and tools to enhance skills and continuously improve the tourism offer. It includes advanced data-analysis tools and predictive models, such as tourism performance infographics, a thematic Data Journal, interactive dashboards on demand, supply and sustainability, and a forecasting model for arrivals.

The Portal also offers a comprehensive upskilling and reskilling programme with over 120 online courses, along with dedicated services for tourism SMEs to promote innovation and competitiveness.

Additional features include digital services from start-ups selected through public calls, tools for accessing funding opportunities, solutions to improve digital presence and online visibility, ESG sustainability assessment tools, experience-planning solutions, a digital concierge service, and dedicated operator support throughout all interactions with the TDH.

Italy - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/2mxaf6

Japan

Japan: Key tourism messages 2026

Tourism direct GDP (2023)	Tourism direct employment (2023)	Travel exports (2024)
1.9% of total GDP (up 0.7 percentage point since 2022)	9.1% of total employment (up 0.2 percentage points since 2022)	24% of total service exports (up 5.5 percentage points since 2023)

National tourism strategy: Tourism Nation Promotion Basic Plan

National tourism administration: Ministry of Land, Infrastructure, Transport and Tourism

National tourism budget: JPY 53 billion (2025)

Key tourism policy priorities and actions:

- *Balancing inbound tourism with local residents* – Addressing localised and regional issues such as congestion and inappropriate tourist behaviour.
- *Promoting domestic and outbound tourism* – Stimulating demand for domestic and outbound travel.
- *Building resilient tourism destinations and tourism sector* – Improving productivity through digital transformation and investments in labour efficiencies.

Tourism in the economy and outlook

Tourism remains a key pillar of Japan's growth strategy and is an important driver of regional development. In 2023, tourism accounted for 1.9% of GDP and contributed 6.3 million jobs or 9.1% of total employment. This is slightly lower than pre-pandemic levels, when tourism accounted for 2.0% of GDP and 9.7% of employment (in 2019). In 2024, travel exports represented 24% of total service exports, up from 18.5% in 2023, and above the pre-pandemic level of 22% in 2019.

International tourist arrivals reached record levels in 2025, reaching almost 42.7 million, an increase of 16% compared to 2024. The top three source countries were Korea (22%), People's Republic of China (21%) and Chinese Taipei (16%).

The domestic market remains an important driver of Japanese tourism. In 2024, a total of 293.1 million domestic overnight visitors were recorded, an increase of 4.2% compared to 2023. In the same period, same day domestic trips increased by 14.1% to 246.8 million.

Tourism governance

Established as an external bureau of the Ministry of Land, Infrastructure, Transport and Tourism, the Japan Tourism Agency takes a leading role in tourism policy, tourism development and promotion of Jap tourist destination. The Agency is also responsible for co-ordinating efforts between public and private tourism stakeholders and the development of tourism destinations.

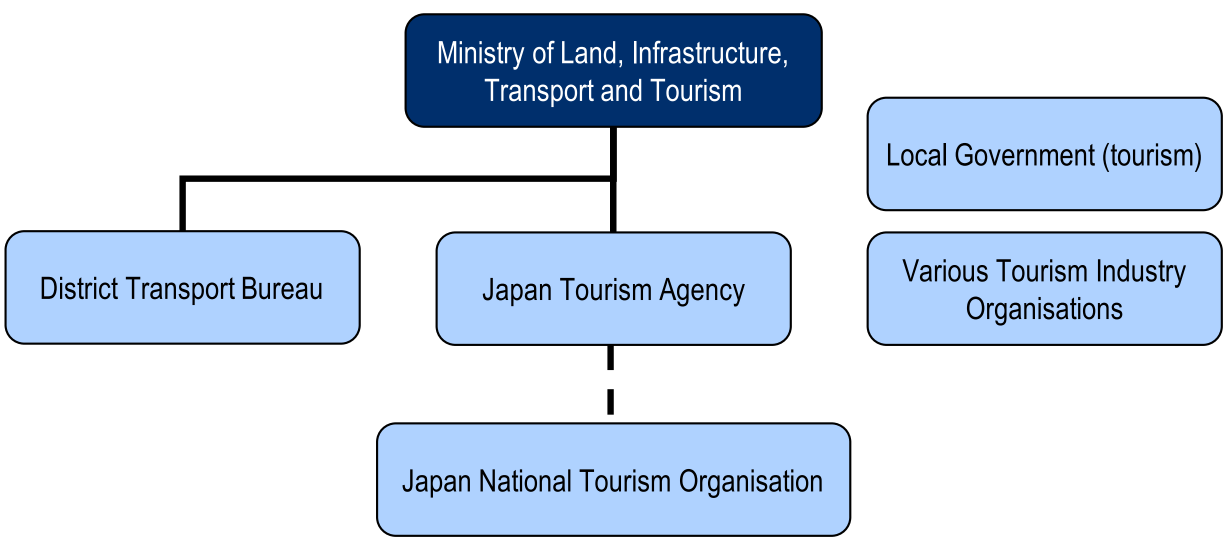
A Ministerial Council for the Promotion of Japan as a Tourism Nation was established in 2013 to unify government efforts on tourism. The Council is presided by the Prime Minister and attended by all Cabinet ministers.

The Japan National Tourism Organisation is under the jurisdiction of the Japan Tourism Agency and acts as the official tourism bureau for the country. It promotes Japan as a tourism destination abroad, provides information to foreign tourists and conducts actions to encourage visits to Japan.

In addition, the nine District Transport Bureau, which are local branches of the Ministry of Land, Infrastructure, Transport and Tourism, conduct tourism-related operations in co-operation with local governments and private stakeholders to promote tourism throughout their areas of jurisdiction. Tourism departments in each District Transport Bureau focus on developing tourist-friendly environments and creating regional circuits for tourists. Additionally, and together with the Japan Tourism Agency, they offer consultation services to local stakeholders on tourism initiatives for regional revitalisation.

The budget for the 2005 fiscal year was JPY 53.0 billion. This included JPY 5.4 billion to develop sustainable tourism destinations, JPY 46.4 billion for strategic initiatives to attract inbound tourists, with a focus on travel to regional areas, and JPY 0.4 billion to promote domestic tourism.

Japan: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Land, Infrastructure, Transport and Tourism, 2026.

Tourism policies and programmes

The 5th Tourism Nation Promotion Basic Plan, approved in March 2026, guides Japan's tourism. Under this plan, tourism is positioned as an important and strategic sector that drives both regional and national development. The five-year Plan is structured around three key pillars:

- Balancing inbound tourism with local residents. This includes addressing localised and regional issues such as congestion and inappropriate tourist behaviour.
- Promoting domestic and outbound tourism. This includes stimulating demand for domestic and outbound travel.

- Building resilient tourism destinations and tourism sector. This includes improving productivity through digital transformation and investments in labour efficiencies.

The Plan aims to develop sustainable tourism, increase consumer spending, promote tourism to regional areas, strengthen transportation networks and urban development through tourism, and support the use of new technologies. The Government will promote measures to enhance satisfaction among local residents and tourists, to support a tourism sector that is "good to work in" and become a destination that is "good to live in" and "good to visit."

As international tourist arrivals recover from the impacts of the COVID-19 pandemic, Japan has found a need to better disperse visitors beyond the three major cities of Tokyo, Osaka and Kyoto, which account for approximately 60% of international tourist accommodation, not including short-term rentals.

An excessive concentration of tourists and instances of inappropriate behaviour at certain locations and during specific time periods are posing ongoing challenges to the daily lives of local residents. To address these emerging issues, it is necessary for each region, while incorporating the views of local communities, to implement continuous and systematic measures to ensure and maintain the quality of residents' lives. Accordingly, the following measures will be undertaken:

- Addressing localised and regional issues such as congestion and inappropriate tourist behaviour.
- Establishing a wide-area framework to promote travel to regional and local destinations.
- Enhancing tourism content that is highly effective in attracting visitors to regional areas and expanding consumption.
- Strengthening the functionality of transportation networks serving regional areas.

To encourage international tourists to visit regional areas, Japan has implemented a regional tourism promotion project. This project draws on the experience of DMOs to provide comprehensive support to regions, including research, strategy planning, enrichment of visitor experiences, improving the environment for welcoming tourists, better distributing products, and promotion. To improve the attractiveness of regions and promote sustainable tourism to regional areas, Japan is providing support to develop profitable, unique, and innovative tourism products and services that utilise untapped regional resources through subsidies and capacity building. Support will also be provided to DMOs, tourism associations, local governments, and private companies to create economically sustainable business models that will be continued over the medium to long term.

The domestic travel market has maintained its expanded state after COVID-19. Therefore, it is a priority for Japan to create new exchanges and tourism resources for domestic visitors. The 'Second Hometown' initiative is designed to create recurrent and continuous visits through 'Connected Minds'. Launched in 2022, the programme aims to create a new style of travel, with connections to the regional community and participation in regional management. In the 2025 fiscal year, the government worked with 16 regions to create exemplary cases which enabled sustainable business continuity, considering the economic effects on the regions. Further work is being considered to expand this to a 'Community Exchange Programme' for companies to develop deeper ties with and take interest in tackling regional challenges. Beyond domestic tourism, Japan is also encouraging Japanese people to travel outbound as a way to construct stable international relations and improve international awareness and mutual understanding.

Creating more sustainable destinations requires actions on both the supply and demand sides of the tourism sector. Labour shortages are a significant structural challenge for the tourism sector, particularly in accommodation establishments. Japan is seeking opportunities to utilise international labour and improve education and management opportunities to address shortages, including through:

- Diversifying the inbound market and tourism offerings to enhance sustainability of the industry.
- Improving productivity through digital transformation and investments in labour-efficiency measures.

- Fostering healthy market competition.
- Ensuring inclusive, diverse and accessible tourism experiences.
- Securing skilled personnel for tourist destinations and the tourism industry.

Tourism as a mechanism to construct international relations in Japan

The Japan Tourism Agency formulated a "policy package for a full-scale recovery of outbound tourism" in March 2023. It is working with the public and private sectors to foster momentum for overseas travel, with the aim to exceed the 2019 level of 20.1 million outbound trips. The number of Japanese people going abroad in 2025 reached 14.7 million, an increase of 13.3% from 2024.

It is believed that promoting outbound travel by Japanese people will help construct stable international relations by improving international awareness and increasing mutual understanding. It will also help maintain and strengthen the aviation network, which can further expand inbound tourism, making it important to proceed in tandem with the promotion of inbound tourism.

The Japan Tourism Agency, Ministry of Foreign Affairs, and Japan Association of Travel Agents have jointly issued a declaration stating that the public and private sectors work together to further encourage outbound travel. A new Japan passport was introduced in 2025, with streamlined procedures, including online applications, and significantly strengthened measures to prevent counterfeiting and alteration. To enable travellers to travel overseas safely, the government will provide local safety information to tourists through an overseas safety information service. Travel agencies are running new campaigns, such as providing support for the cost of obtaining a passport.

To promote international exchange among young people, Japan has been working to promote overseas educational trips since the fiscal year 2020, with high-added-value overseas educational trip programmes being developed in collaboration with travel agencies and schools since the fiscal year 2023. An "overseas educational trip symposium" was held in March 2026 for school officials and travel agencies to promote these trips, highlighting the trip programmes developed in the 2025 fiscal year.

Japan - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/qamjbe

Korea

Korea: Key tourism messages 2026

Tourism direct GDP (2024)	Tourism direct employment (2024)	Travel exports (2025)
1.71% of total GDP (provisional data) (up 0.02 percentage point since 2023)	1.57% of total employment (provisional data) (down 0.01 percentage points since 2023)	18.1% of total service exports (up 0.7 percentage points since 2024)

National tourism strategy: 6th Basic Plan for Tourism Promotion, 4th Basic Plan for Tourism Development

Responsible government agency: Ministry of Culture, Sports and Tourism

National tourism budget: KRW 1.47 trillion (2026)

Key tourism policy priorities and actions:

- *Creating a tourism environment accessible to all citizens* – Improving the physical environment and fostering cultural maturity to ensure everyone can travel freely.
- *Building a smart tourism ecosystem based on digital transformation* – Establishing a personalised, data-driven tourism ecosystem through the digital integration and advancement of the entire tourism value chain.
- *Cultivating region-specific tourism resources and organisations* – Enhancing unique local resources and nurturing organisations to promote regional self-reliance and growth.

Tourism in the economy and outlook

Tourism plays a vital role in supporting Korea's economic recovery. According to the TSA, the number of employees in the tourism sector has been rising since 2020, with a provisionally estimated 449 272 people employed in the sector in 2024, representing approximately 1.6% of total employment. Korea's travel exports increased by 10.4% in nominal terms from USD 24.7 billion in 2024 to USD 27.2 billion in 2025, accounting for 18.1% of total service exports.

2025 was a year of significant growth for the tourism sector in Korea as it hosted the APEC Economic Leaders Meeting and other international events throughout its 2025 APEC host year. The total number of inbound visitors to Korea exceeded 18.9 million, up 15.7% compared to 2024. Korea's top three inbound source markets in 2025 were the People's Republic of China (28.9%), Japan (19.3%), and Chinese Taipei (10.0%).

The number of domestic tourists totalled 122.6 million in 2024, down 6.8% from 2023, but still up from 94 million in 2021. Meanwhile, day trips increased slightly from approximately 179.4 million in 2023 to about 181.6 million in 2024.

Tourism governance

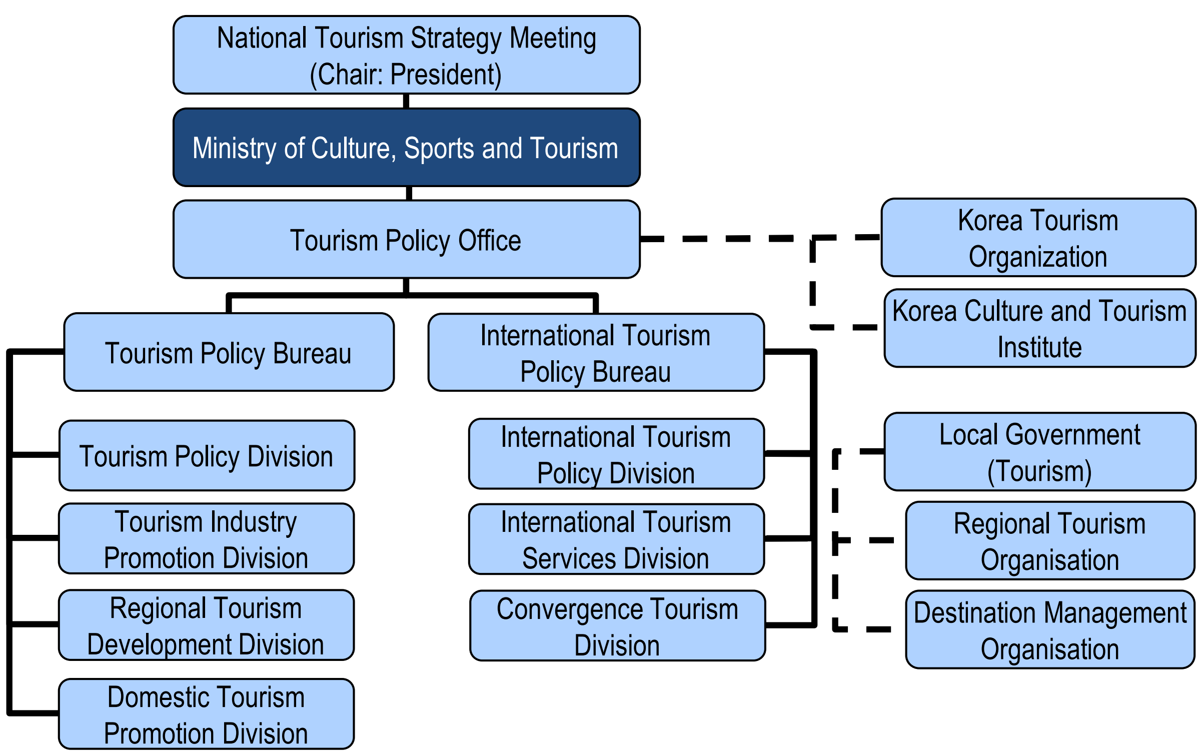
The Ministry of Culture, Sports, and Tourism of the Republic of Korea (MCST) is responsible for shaping and implementing tourism policies. As of 30 December 2025, the tourism function has been elevated to a dedicated Tourism Policy Office within the Ministry, supported by a Deputy Minister responsible solely for tourism. The Tourism Policy Office is organised around two main directorates, covering tourism policy and international tourism policy. The Ministry implements tourism promotion policies aimed at improving tourism conditions and fostering the tourism industry, with support from its executive bodies, the Korea Tourism Organization (KTO) and the Korea Culture & Tourism Institute (KCTI).

The National Tourism Strategy Meeting is the highest decision making body responsible for planning and co-ordination of tourism policies. It was previously chaired by the Prime Minister but has recently been elevated to a Presidential-led meeting. This strategic platform facilitates the harmonisation of tourism policies across various ministries, government agencies, the tourism sector, and relevant organisations. The inclusion of representatives from the tourism sector and related organisations fosters a collaborative approach, allowing diverse perspectives to shape policy discussions.

At the regional level, local governments, in collaboration with the Ministry, autonomously formulate and execute their tourism policies. This approach emphasises the importance of tailoring strategies to the distinctive characteristics of each region, promoting diverse tourist attractions, and developing essential tourism infrastructure.

The 2026 tourism budget for Korea amounts to KRW 1.47 trillion, distributed across various accounts. A total budget of KRW 2 billion was allocated to the General Account, KRW 275.5 billion to the Special Account for Balanced Regional Development, and the largest amount, KRW 1.20 trillion, to the Tourism Promotion and Development Fund, which is allocated in the form of loans and subsidies.

Korea: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Culture, Sports and Tourism, 2026.

Tourism policies and programmes

Tourism in Korea is guided by the 6th Basic Plan for Tourism Promotion, which spans from 2023 to 2027, and the 4th Basic Plan for Tourism Development, which spans from 2022 to 2031. Guided by the vision of positioning Korea as a tourism powerhouse driven by K-Culture, the Basic Plan for Tourism Promotion presents the following four major strategies:

- Promote Korea as a globally attractive tourism destination.
- Innovate the tourism industry in partnership with the field.
- Grow domestic tourism while sharing the benefits with the public.
- Revitalise regional tourism by encouraging more frequent and longer stays.

The Plan for Tourism Development provides strategies to promote an intelligent and innovative tourism industry focused on qualitative development and where people and regions grow together. It is centred around establishing sustainable tourism that co-exists with future generations.

Accessibility for tourism is being supported by improving the physical environment and fostering cultural maturity. More specifically, the Ministry has carried out the Accessible Tourism Projects to improve barriers faced by visitors. They are developed considering not only the need to enhance physical connectivity, but also the changing service needs of those with accessibility issues. The key of this initiative is to ensure that guides and information are tailored to support tourists with disabilities (e.g. sign language interpretation for the hearing impaired, emotional stability and interaction content for people with developmental disabilities or braille books for the visually impaired).

Korea has expanded the “Employee Vacation Support Programme”, which aims to promote a corporate culture that encourages the free use of leave and to stimulate domestic travel. Launched in 2018, the programme is implemented under a tripartite cost-sharing scheme among the government, companies, and employees, with an annual budget of approximately KRW 15 billion. The number of participating workers rose from 20 000 in 2018 to 124 000 in 2025, while the number of participating companies expanded from 2 441 to 13 660 in the same period. The programme has helped revitalise domestic travel and boost domestic demand, generating an estimated KRW 910 000 in travel spending for every KRW 100 000 of government subsidy. It has also contributed to improving workplace leave culture.

The expansion of AI has driven the need for continued digital transformation to keep up with tourists’ digital demands and ensure that tourism businesses are not left behind. The Korea *Guseok Guseok* (“Every corner of Korea”) domestic travel information platform uses AI to innovate the entire travel process. It includes:

- Travel exploration: AI summary of travel articles and comments for key information at-a-glance.
- Recommendations and planning: Travel itineraries tailored to users’ needs and preferences.
- Refinement: Enhancing recommendation accuracy by using data from user activities.
- Dissemination: Creating timely and trustworthy travel content based on big data from navigation systems, social media and the travel industry.

The “AI *Kkokkok* Travel Recommendation Service” provided by the Korea Tourism Organization incorporates safeguards to ensure algorithmic transparency and fairness, minimising both search bias and selection bias in its recommendation process. In addition, the system operates cross-referenced recommendation models and datasets for each category through A/B testing, monitoring consumption and engagement rates, and adjusting content exposure by location, based on these metrics.

Supporting the digitalisation of tourism businesses to meet the needs of tourists remains a core priority. Private sector technologies are being integrated to improve visitor convenience and enhance regional tourism competitiveness. The 1330 Korea Travel Hotline utilises ChatGPT API to translate, summarise, and categorise inquiries in real time, and to store the results for follow-up. The system reviews previous cases and provides consultation recommendations that agents can refer to during interactions with visitors. Analysis services are also available on customer characteristics and behaviours through the Korea Tourism Data Lab, which integrates a variety of big data for analysis. The Data Lab had approximately 80 000 members and around 1 million monthly visitors as of June 2025.

The "Tourism Voucher for Digital Transformation Program" assists tourism companies in their digital transformation efforts, including the adoption of new technologies such as digital solutions, AI, and service robots, as well as providing support for tasks including app and web development and online marketing. Beneficiary companies are selected through a comprehensive evaluation process after the review of their implementation plans, operational capacity, and expected outcomes. In 2025, the programme provided vouchers worth almost KRW 7.5 billion to 162 beneficiary companies.

Korea has multiple initiatives to increase domestic tourism for balanced tourism development. The "Travel Month" initiative is a flagship campaign aimed at promoting domestic tourism. By offering discounts on transportation and travel products, providing information on local travel, and hosting various travel events, the initiative seeks to spark a domestic tourism boom, stimulate domestic consumption through tourism, and shift the demand for overseas trips toward domestic travel. Additionally, the "Digital Tourism Resident Card Project" was introduced to increase the population in areas experiencing population decline and to boost tourism consumption. The digital resident card can be applied for online and provides discounts for accommodation, restaurants and attractions across these regions.

The cross-cutting nature of tourism creates an increasing need for inter-ministerial co-operation. Korea is actively working across ministries to further develop niche tourism opportunities (see box below).

Fostering inter-ministerial collaboration to develop tourism opportunities in Korea

The tourism sector intersects with the remit of many ministries in Korea, including the Ministry of Oceans and Fisheries and the Ministry of Agriculture, Food and Rural Affairs. In 2025, the Korean Government established a project to provide support by promoting inter-ministerial co-operation on tourism. In 2026, a budget of KRW 5.5 billion has been allocated to revitalise cruise tourism around seven major ports in Korea: Sokcho (Gangwon), Pohang (Gyeongbuk), Busan, Incheon, Yeosu (Jeonnam), Jeju, and Seosan (Chungnam), with the goal of attracting a total of one million cruise tourists by 2027.

In April 2025, the Korea enacted the "Act on the Promotion of Healing Tourism Industry", with the aim of systematically developing the healing (or wellness) tourism sector and creating new regional tourism destinations to lay a foundation for further growth. The Act, which took effect on 9 April 2026, includes provisions on (i) fostering the healing tourism industry, (ii) establishing the necessary foundation and providing support for its development, and (iii) designating and fostering healing tourism zones. In addition, the Act defines relevant terms, such as healing tourism resources and facilities, to clarify policy targets and objectives, and sets out provisions on creating a collaborative network, registering healing tourism operations, conducting fact-finding surveys and compiling statistics, and nurturing specialised personnel, thereby establishing an industrial foundation for active policy implementation.

Korea - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/9sh6jn

Latvia

Latvia: Key tourism messages 2026

Tourism direct GVA (2023)	Tourism direct employment (2025)	Travel exports (2025)
3.2% of total GVA (up 0.4 percentage points since 2022)	8.6% of total employment (equal to share in 2024)	16.9% of total service exports (up 0.6 percentage points since 2024)

National tourism strategy: Latvian Tourism and Events Industry Export Promotion Strategy until 2027

National tourism administration: Ministry of Economics

National tourism budget: EUR 4 million (2025)

Key tourism policy priorities and actions:

- *Creating competitive tourism products* – Driving tourism demand by creating attractive, inclusive and accessible products and utilising high-impact events to strengthen the country's visibility and reputation while reducing seasonality and creating lasting benefits for the economy.
- *Driving tourism development through better data* – Harnessing the power of modern data collection and analysis, in close co-operation with all ministries, to enable smarter decisions, support innovation, and open new opportunities for sustainable and high-value tourism growth.
- *Improving the tourism business environment* – Fostering a competitive and supportive ecosystem by reviewing and streamlining legal and regulatory frameworks, and reducing administrative burdens.

Tourism in the economy and outlook

Tourism is a driver of the Latvian economy. Tourism's direct share of GVA was 3.2% in 2023. Employment in tourism-related sectors represented 8.6% of the total workforce in 2025, remaining unchanged compared to 2024. Travel exports represented 16.9% of total service exports (EUR 1.4 billion), up from 16.3% in 2024 and 15.8% in 2019. In nominal terms, travel exports have increased by 53.6% since 2019.

In 2025, 2.8 million domestic and international tourists stayed in Latvia's tourist accommodation establishments, a 4.5% increase compared with 2024. According to hotel and other accommodation statistics, 1.7 million international visitors stayed in registered accommodation establishments in Latvia, an increase of 5.3% compared with 2024. Tourists spent a total of 3.1 million nights, which is 8.3% more than in 2024. The top visitor markets for Latvia were Lithuania (16.3%), Estonia (11.3%) and Germany (10%). Domestic overnight visitors increased by 3.2% to 1.1 million in 2025.

Tourism governance

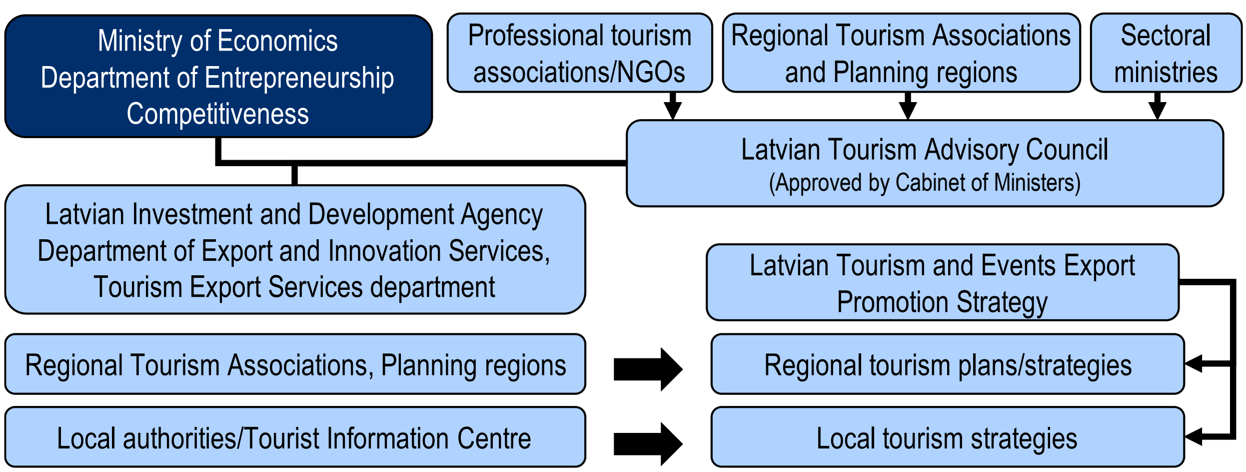
The Ministry of Economics is responsible for developing and co-ordinating the implementation of national tourism policy. The Investment and Development Agency of Latvia is responsible for implementing tourism policy and promoting Latvia both domestically and abroad, supervised by the Ministry of Economics.

The Latvian Tourism Advisory Council and its subgroups enable ongoing co-operation across the public and private sector. The Council is overseen by the Ministry of Economics and includes representatives from several ministries and non-governmental organisations related to tourism, with the Chair appointed by the Minister for Economics.

Tourism development strategies and plans are also undertaken at regional and local levels, by planning regions or regional tourism associations, as well as local municipalities.

In 2025, EUR 4 million were allocated specifically for tourism promotion and marketing activities, including administrative costs, from the state budget and the funding programmes. Additional funding is also available through tourism-related sectoral and horizontal support programmes, including different initiatives such as for attracting foreign film productions to Latvia, supporting the organisation of major international events, promoting digitalisation, improving workforce skills, and strengthening export capacity, etc.

Latvia: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Economics, 2026.

Tourism policies and programmes

Latvian Tourism and Events Industry Export Promotion Strategy until 2027 aims to increase the export capacity of the Latvian tourism sector by promoting the development of innovative, personalised tourism products and products with high added value, while adhering to the principles of sustainable development. The Strategy has four key priorities:

- Product and destination development.
- Demand stimulation.
- Data-driven management.
- Improving the business environment and streamlining the regulatory framework for tourism.

The development of new products, stimulation of their demand and the promotion of accessibility remain core priorities for business, destinations and government. Support is directed towards building co-operation networks or clusters, strengthening product development, encourage innovation, and enable wider international marketing.

During the EU Structural Funds 2021–2027 programming period, the Investment and Development Agency of Latvia continues to provide aid to Latvian small and medium-sized enterprises for innovative business development. Various types of export support under the SME programme include an export support action plan, participation in national exhibitions, trade missions, visits abroad by high-ranking state officials. In addition, under the tourism product development programme (tourism clusters), entrepreneurs are supported to develop new tourism products and services.

In 2024, a review of support measures for tourism SMEs was launched to ensure more targeted and effective use of resources. This included assessing grant schemes, business advisory services, and improving access to digital tools. These aim to create a more efficient regulatory environment, enabling tourism businesses to focus on service quality, innovation, and sustainable growth.

Large-scale events play a vital role for Latvian tourism, serving as catalysts to attract new visitors, reduce seasonality, and showcase Latvia as an active year-round destination. They create synergies across regions and sectors, amplifying the country's visibility and economic benefits. The Investment and Development Agency of Latvia provides support for the implementation of major event projects in Latvia in accordance with "Procedure for granting state budget co-financing for large, significant public events and foreign film shoots in Latvia", approved in February 2025. The aim of the support is to provide state budget co-financing for the organisation of major events in Latvia, creating a positive economic impact and promoting a positive international image of Latvia (see box below).

At the same time, new opportunities are being explored by aligning tourism with the creative industries to ensure long-term competitiveness. Targeted support for the film industry can generate direct economic impact and enhance Latvia's international profile through location-based promotion. By featuring Latvian landscapes, heritage sites, and urban environments in international productions, the country strengthens its image as a distinctive and attractive destination. A notable example of this strategy is the filming of the German mini-series *Sisi* in various locations in Latvia including Riga Old Town, Rundāle Palace, Cesvaine Castle and Straupe Castle. These cross-sector initiatives highlight Latvia's integrated approach to tourism development, where culture, sports, and creative industries work together with tourism to maximise impact.

The final priority of the Strategy is to improve the tourism business environment and the related regulatory frameworks, considering the cross-sectoral nature of tourism. In co-operation with the sector through working group meetings, written consultation rounds, bilateral discussions, and public consultation procedures, the following actions have been prioritised within the framework of Strategy implementation:

- Review of the Tourism Law, including the clarification of definitions in the Law, for example - in particular the definition of "tourist accommodation", explicitly ensuring that short-term rental accommodation is also clearly included within the sector.
- Review of the system for providing and monitoring package tourism services - reporting requirements have been streamlined, with reductions in both the volume and frequency of reports.

Drawing on data provides opportunities to better manage tourism demand and supply. Open data and information exchange between businesses and the government can strengthen the evidence-base needed to make both business and policy decisions. The Latvian Open Data Portal allows for secure and effective data sharing and continues to be supported and promoted by the Latvian Government.

Using creative approaches to showcase the tourism offering in Latvia

Latvia has been exploring creative new ways to maximise the impact of limited financial resources by supporting tourism initiatives with potential to stimulate innovation, increase competitiveness, and generate value for both businesses and the national economy. In 2024, Latvia's tourism sector was showcased across several creative and high-impact initiatives.

- 617 "Home Cafés" welcomed more than 86 000 visitors in 2024, promoting tourism sustainability and inclusiveness through new product creation, support for small entrepreneurship, and the preservation and promotion of cultural heritage.
- In 2024, Latvia was the honoured guest country at Hamburg Port Anniversary Festival in Germany, one of the world's largest harbour festivals, attracting around 1.5 million visitors. Alongside a vibrant four-day cultural programme, Latvia highlighted its tourism offer, while placing special emphasis on business and partnership opportunities.
- In 2024, Latvia hosted the 8th stage of the FIA World Rally Championship filled tourist accommodations and restaurants across Kurzeme while promoting Latvia internationally as a safe and attractive destination. The event was attended by 10 196 foreign visitors, with a total of 37 837 people purchasing tickets, receiving invitations, or accreditations.
- The FIBA EuroBasket 2025 event hosted in Riga, Latvia generated significant tourism and media impact. More than 50 000 visitors attended, with an average stay of 3.4 nights, while 2 267 participants stayed on average 13.5 nights. Social media reach related to EuroBasket and references to Riga or Latvia exceeded 189 million, including more than 498 000 engagements (reactions, comments and shares) and over 6.8 million video views.

Another key achievement was the approval of eight new tourism clusters in 2024, strengthening Latvia's tourism ecosystem and fostering collaboration across sectors. The thematic clusters include health tourism, business and events, culture and creative industries, and nature and active tourism and the geographic clusters focus on Vidzeme, Pierīga, Gauja National Park, and Zemgale.

These clusters serve as a foundation for stronger co-operation, the development of new tourism products, and sustainable growth. They enhance Latvia's position as an attractive destination, while supporting economic development, job creation, and investment attraction.

Latvia - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/m5b9t2

Lithuania

Lithuania: Key tourism messages 2026

Tourism direct GVA (2024)	Tourism direct employment (2024)	Travel exports (2024)
2.8% of total GVA (up 0.2 percentage points since 2023)	4.5% of total employment (down 0.1 percentage points since 2023)	8.1% of total service exports (up 0.2 percentage points since 2023)

National tourism strategy: National Tourism Pathway 2030

Responsible government agency: Ministry of the Economy and Innovation

National tourism budget: EUR 6.4 million (2025)

Key tourism policy priorities and actions:

- *Strengthening tourism competitiveness* – Positioning Lithuania as a destination that promotes responsible travel while strengthening national promotion, investing in recovery and resilience and improving connectivity.
- *Providing a safe and secure environment for tourists* – Strengthening emergency preparedness using mobile alert systems and clear communication protocols, including for tourists, and enhancing cyber security.
- *Improving international connectivity* – Investing in air and aviation infrastructure to enable better connectivity with neighbouring countries and European hubs.

Tourism in the economy and outlook

Lithuania's tourism sector continues to build momentum as a driver of economic growth. In 2024, tourism directly contributed 2.8% to national GVA, or EUR 2 billion. Tourism also employed 49 400 people, accounting for 4.5% of the total workforce, an increase of 1% in the number of employees compared to 2023. Travel exports exceeded EUR 1.8 billion, or 8.1% of total service exports in 2024 and has surpassed travel exports in 2019 by 36%.

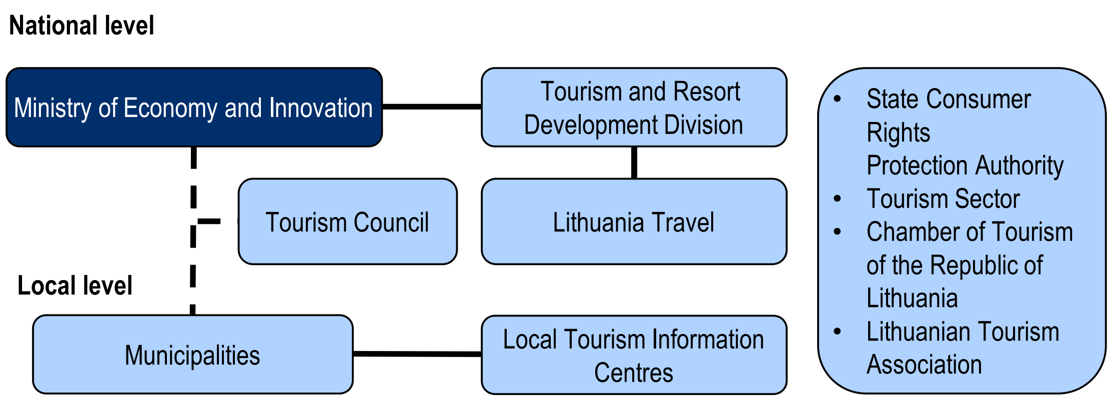
Lithuania recorded 1.5 million tourist arrivals at accommodation establishments in 2025, representing a 4.4% increase from 2024, when Lithuania welcomed 1.45 million tourists. The top international markets in 2024 were Poland (12.0%), Germany (10.6%) and Latvia (10.0%). Lithuania's domestic market remained stable, with 2.7 million domestic overnight trips in 2024, an increase of 1.3% compared to 2023.

Tourism governance

Responsibility for tourism in Lithuania is spread across three public bodies. The Tourism and Resort Development Division, Ministry of the Economy and Innovation, is responsible for tourism policy and international co-operation. Lithuania Travel, a public company established in 2019, conducts marketing and tourism promotion actions for international and domestic markets. Its main goal is to promote Lithuania as a tourism destination, developing inbound and local tourism in the country. The State Consumer Rights Protection Authority is responsible for the supervision of tourism service providers.

The Tourism Council, an advisory body of the Ministry of Economy and Innovation, was renewed in 2023. Its members include tourism-related ministries and tourism business associations, chaired by the Vice-Minister of Economy and Innovation. At local level, municipalities and Local Tourism Information Centres are responsible for tourism. The Chamber of Tourism of the Republic of Lithuania is the key tourism business organisation, representing 11 tourism business associations.

Lithuania: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of the Economy and Innovation, 2026.

Tourism policies and programmes

The national tourism strategy, National Tourism Pathway 2030, provides a guide for the collaborative development of Lithuania's tourism economy until 2030. The Pathway, adopted in 2024, is centred on inclusive growth, regional promotion, and community engagement. It aims to ensure the systematic management of the tourism sector and to increase its competitiveness, transparency and importance as part of Lithuania's economy. The Pathway builds on guidelines developed by Travel Lithuania in 2022 for the development of Lithuanian tourism. The guidelines call on the tourism community to implement measures across twenty-seven areas, including:

- Investing in circularity and reducing water and energy consumption, waste and pollution, while better meeting the growing demand for sustainable tourism.
- Increasing data sharing to enable the provision of new innovative tourism services and more sustainable management of tourist destinations, including through the National Tourism Information System (see box below).
- Investing in skills to have sufficient numbers of qualified workers ready to take advantage of attractive career opportunities in the sector.

Lithuania is prioritising improving the competitiveness of the tourism sector and positioning tourism as a priority export sector. It is strengthening Lithuania Travel as a central tourism agency and promoting Lithuania as a responsible travel destination that values authenticity, manages tourist flows during peak periods, and champions lesser-known experiences. To better serve this market, the scope of Lithuania Travel will also be expanded to serve as the Lithuania Conference Bureau in 2026.

Lithuania is providing targeted support to tourism businesses to participate in international fairs, business events and exhibitions and to improve connectivity. The aim of this support is to encourage inbound tourism operators and associations to establish international contacts, implement joint initiatives, and foster co-operation by compensating expenses including travel, accommodation, event tickets, and registration fees. To be eligible, Lithuanian tourism associations must represent at least ten inbound tourism service providers (natural or legal persons), and be established for no less than one year prior to submitting the application. In 2025, EUR 114 000 was allocated to support businesses.

New air routes with major European hubs are being implemented to support the dispersal of tourism flows beyond urban centres. In 2025, Vilnius Airport officially opened its new departures terminal, doubling passenger throughput from 1 200 to 2 400 passengers per hour. Lithuania also significantly expanded its direct flight network across its three airports, especially during the summer and winter seasons. Compared to 2024, four new carriers were added with the number of direct connections increased, new destinations added, and existing routes strengthened.

Rail Baltica, a major European infrastructure initiative, also provides a key opportunity for increased connectivity. The project aims to integrate the Baltic States (Estonia, Latvia and Lithuania) into the European rail network. In 2025, Rail Baltica entered a phase of large-scale construction across all Baltic states. In Lithuania, the bridge over the Neris River - one of the most complex structures in the project - is progressing with advanced engineering solutions and environmental safeguards. In addition, a EUR 38.31 million design contract was signed for the strategic Poland–Kaunas connection, marking a major step in cross-border integration.

Lithuania actively leverages its expatriate community to become tourism ambassadors for the country. Lithuanians residing abroad are encouraged to share information about Lithuania and to recommend the country as a travel destination. In 2025, more than 6 000 members of the Lithuanian diaspora were reached through two major events: the World Lithuanian Sports Games held in Palanga, Lithuania, and the World Lithuanian Song Festival in Cleveland, USA.

AI provides unique opportunities for the marketing of destinations. Lithuania has already embraced this shift with the launch of its AI-powered travel assistant on the Lithuania Travel website. This innovative tool supports visitors with personalised recommendations, from top attractions and hidden gems to cultural etiquette, seasonal highlights, and local experiences. It allows travellers to plan their journey with ease, offering meaningful insights that reflect Lithuania's heritage, nature, and lifestyle. Integrating AI into the marketing ecosystem has provided opportunities to modernise communication and create more personalised, efficient, and engaging interactions with travellers.

Lithuania is actively expanding education and training programs to develop a skilled workforce for the tourism sector. These initiatives include online learning platforms and professional development opportunities for tourism specialists. In 2025, 500 Lithuanian tourism professionals were granted access to study at the UN Tourism Online Academy, where they can earn internationally recognised certificates. Representatives of Lithuania's private and public tourism sectors were able to choose from a wide range of courses, including business event management, innovation and digital transformation in the tourism sector, destination marketing, sustainable destination management, restaurant or hotel operations, culinary arts and gastronomy, and a teacher training programme.

Building a national tourism information system in Lithuania

Lithuania has continued to expand and improve the National Tourism Information System (NTIS) and organise training for accommodation service providers to ensure smooth data management and the collection of statistics. The NTIS now serves as central platform for managing and analysing tourism-related data. Specific elements of the NTIS include:

- Accommodation sector data - the NTIS enables accommodation service providers to automate the submission of information about their guests and tourism statistics directly through the system, rather than manually via online or paper forms.
- Visitor information - e. Turistas (e. Tourist) is a module of Lithuania's NTIS, designed to collect travellers' data and use it for both statistical purposes and to meet Schengen requirements. Currently, e. Tourist sends data exclusively to the national statistics agency and represents its primary source of tourism-related data. Additionally, the system integrates tourism flow data derived from mobile sources, offering valuable insights into travel patterns.
- Near real-time visitor data – the NTIS includes data analysis and an interactive map to visualise visitor information based on anonymised mobile positioning data from mobile network operators into statistical insights. The data will be updated in real-time and be available for users approximately 1-2 weeks after collection.
- Lithuania's tourism resources – information is included on natural sites, landmarks, cultural heritage objects, and tourism services. This information will be available in open data format and will also allow tourists or tour operators create trips based on preferences and with the help of AI. A tourism infrastructure survey helps to assess how well municipalities are prepared to receive tourists and identify existing gaps.

All collected information is accessible via the updated Lithuania.travel website, which now features advanced tools for filtering and sorting data, visualising trends through charts, and creating personalised tourist routes or travel packages for tour operators. The Tourism Data Dashboard helps monitor the performance of the country's tourism sector. The dashboard shows publicly available accommodation data provided by Statistics Lithuania, together with the sector's employment and balance of payments in tourism companies. In addition, it presents data covering import and export of tourism services and outbound tourism data from other countries.

The NTIS has reduced the administrative burden for accommodation service providers, enhanced the quality timeliness of tourism statistics, and provided additional data to inform business development and decision making. This will hopefully lead to more sustainable tourism services in regions and prolonged tourists' stays with a larger tourism input in the economy. In the future, Lithuania plans to expand the system's functionality to include integration with the tax authority, tourist tax collection, and centralised licence issuing to improve administrative functions.

Lithuania - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/zckjw8

Luxembourg

Luxembourg: Key tourism messages 2026

Tourism direct GDP (2022)	Tourism direct employment (2022)	Travel exports (2024)
0.8% of total GDP (up 0.1 percentage points since 2021)	8.1% of total employment (up 0.2 percentage points since 2021)	5.0% of total service exports (up 0.8 percentage points since 2023)

National tourism strategy: People, Regions and Economy

Responsible government agency: Ministry of the Economy, SMEs, Energy and Tourism

National tourism budget: EUR 34.8 million (2026)

Key tourism policy priorities and actions:

- *Placing sustainability at the core of future tourism development* – Introducing a new Sustainability Concept which provides concrete steps toward meeting environmental objectives and enhancing the quality of life and tourism experiences.
- *Fostering a balanced tourism sector* – Fostering a tourism sector that offers an authentic and high-quality experience for visitors while benefitting and increasing the quality of life for residents.
- *Building a modern, quality tourism offer* – Adapting the tourism offer to the changing demands of tourists, including through a new action plan on wine tourism and user-oriented digitalisation.

Tourism in the economy and outlook

Tourism provides economic benefits to the Luxembourg economy. In 2022, tourism directly generated 0.8% of Luxembourg's total GDP, down from 1.2% of GDP in 2019. The contribution to GDP has remained constant after the pandemic, with the tourism sector growing at the same pace as the national economy. Tourism provided 40 421 direct jobs in 2022, an increase of 6.6% compared to pre-pandemic levels.

In 2025, international arrivals in registered paid tourism accommodation totalled 1.41 million, compared to 1.36 million arrivals in 2024. European tourists are the driving force of inbound tourism in Luxembourg, representing 70% of international visitors. The three main international markets in 2024 were the Netherlands (23%), Belgium (18%) and Germany (17%).

The outlook for 2026 is positive based on surveys and booking data.

Tourism governance

Tourism policy in Luxembourg is the responsibility of the Ministry of the Economy, SMEs, Energy and Tourism. The General Directorate for Tourism is responsible for regulations, and awards grants to associations that aim to improve tourism products and the quality of residents' lives. The General

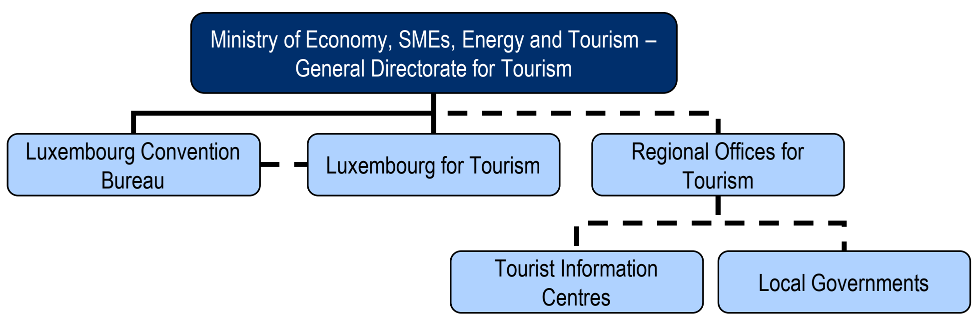
Directorate also implements policies to optimise the national tourism offer, through developing tourism labels, providing promotional opportunities and maintaining close relationships with international partners.

Luxembourg for Tourism is responsible for tourism marketing and for promoting Luxembourg as a destination. The organisation is largely financed by the state with support from regional tourist offices, professional associations and private sector actors.

Regional Offices for Tourism are members of Luxembourg for Tourism and are represented at the national level. The regional tourist offices have the mission of co-ordinating local stakeholders (e.g. Tourist Information Centres and Local Governments) and developing the regional tourism offer. The capital of Luxembourg City has its own tourist structure, the Luxembourg City Tourist Office. The Luxembourg Convention Bureau is an economic interest group, which is the dedicated body for developing the MICE sector.

In 2026, the total budget allocated for tourism in Luxembourg is EUR 34.8 million, which includes EUR 4.3 million for regional DMOs and EUR 7 million for Luxembourg for Tourism.

Luxembourg: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Economy, 2026.

Tourism policies and programmes

Luxembourg tourism is guided by the People, Regions and Economy Strategy. The Strategy, adopted in 2022, aims to strengthen the positive effects of tourism and support the sector in its fast-moving development, while being relevant and responsive to evolving sustainability expectations. The goal of the Strategy is to sharpen, reframe and put into practice the main strategic aims of Luxembourg's tourism development policy. This Strategy serves as a guide for Luxembourg's tourism sector on an ongoing basis. The core priorities of the Strategy are:

- A modern tourism offer that is rich in experiences: adapting the existing tourism offer to current needs, particularly in outdoor, gastronomy and cultural tourism. This includes also inclusive tourism experiences such as comfort trails which offer the possibility to visitors with limited mobility of walking or rolling along the natural beauty of Luxembourg with ease.
- Attractive and resilient tourism businesses: encouraging investment and improving the attractiveness of the sector for qualified staff. The Tourism Academy platform provides updated training designed to enhance skills and expand knowledge to strengthen the tourism sector. The new centralised platform was launched in November 2025 to offer training courses for those interested in becoming tour guides, with planned expansion to other tourism areas in the future.
- A sustainable, accessible, and quality stay for all: considering the ecological, economic, social and cultural dimensions of sustainability in the tourism offer, and improving the quality of life of tourists, residents and cross-border commuters (see box below).

- Inclusive and user-oriented digitalisation: Digitalisation is seen as a basic requirement for a modern tourism offer in Luxembourg. To make products more inclusive and accessible, an increasing number of tourism attractions now display information in simple, easy-to-read language, both digitally and in print.
- Collaboration based on trust and strong networks: establishing close co-operation between stakeholders in the tourism sector, to encourage constructive exchange while involving the public.
- Targeted implementation: monitoring the implementation of strategic objectives. Luxemburg for Tourism collects statistical data from different sources and performs market surveys on a range of topics, including customer satisfaction and the views of residents on the local tourism offer and the impact it has on locals' lives. The data collection process is continually updated and improved and serves as the basis for assessing the success of strategy implementation. This data is made available to tourism stakeholders through a common tourism database.

Creating a structured approach to sustainable tourism in Luxembourg

Luxembourg presented a national concept for sustainable tourism on December 17, 2024, with a vision to position Luxembourg as a sustainable and authentic destination, appealing to residents, cross-border workers, and international visitors. This initiative represents a significant step forward in the country's tourism strategy, placing sustainability at the heart of future development. The concept introduces a structured approach with clear objectives, measurable indicators, and a framework to guide and support sustainable tourism projects. It aligns with Luxembourg's national tourism strategy and 2030 National Sustainable Development Plan, as well as the UN Sustainable Development Goals. Built on four key pillars the concept seeks to preserve natural resources, promote social equity, celebrate cultural heritage, and ensure long-term economic viability for tourism stakeholders. The main strategic axes are:

- Sustainable management: integrating sustainability criteria into tourism subsidies and strengthening institutional co-operation and intersectoral exchange.
- Sustainable tourism offer: improving eco-friendly and accessible mobility between tourist sites, enhancing the EcoLabel Luxembourg, which currently certifies 48 establishments, and utilising local and regional product.
- Communication and awareness: digitalising nature protection rules to encourage environmentally respectful visitor behaviour and adapting marketing to attract the right markets to meet sustainable tourism goals.

The concept was developed collaboratively with regional tourism offices, the Luxembourg City Tourist Office, Luxembourg for Tourism, external experts, representatives from nature parks and other stakeholders. A participatory workshop in February 2024, involving 60 stakeholders, helped define priorities and key actions. The concept offers a tangible step toward meeting environmental objectives and fostering high-quality tourism that respects people and nature, strengthens the local economy, and preserves cultural heritage.

Luxembourg - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/40klu6

Mexico

Mexico: Key tourism messages 2026

Tourism direct GVA (2024)	Tourism direct employment (2024)	Travel exports (2024)
8.7% of total GVA (up 0.2 percentage points since 2023)	7.4% of total employment (up 0.2 percentage points since 2023)	52.3% of total service exports (down 2.3 percentage points since 2023)

National tourism strategy: National Tourism Policy Framework 2024-2026

Responsible government agency: Ministry of Tourism

National tourism budget: MXN 1.77 billion (2025)

Key tourism policy priorities and actions:

- *Strengthening destination management and local capacity* – Providing technical assistance and guidance for destination plans while undertaking capacity building for local DMO functions and creating tools to understand visitor pressure and potential carrying capacity.
- *Enhancing sustainability and climate resilience* – Introducing sustainability standards and good-practice protocols and integrating climate risks in tourism planning, in co-ordination with necessary authorities.
- *Increasing the quality and competitiveness of the tourism offer* – Working with tourism businesses to expand quality and certification programmes while providing ongoing support for regulatory improvement and compliance.

Tourism in the economy and outlook

Tourism is an important contributor to the Mexican economy. In 2024, tourism directly contributed MXN 2.7 trillion to the Mexican economy, accounting for 8.7% of total GVA, above the pre-pandemic share of 8.6%. The sector directly employed 2.9 million people and accounted for 7.4% of the total workforce, which is above the 6.6% share in 2019. Travel exports reached USD 33.0 billion in 2024, representing 52.3% of total service exports, compared to 54.7% in 2023.

In 2024, Mexico received around 45 million international tourists, on par with pre-pandemic levels in 2019 and representing a 7.4% increase from 2023. The top markets were the United States (31%), Canada (6%) and the United Kingdom (1%). Growth continued in 2025, with inbound arrivals increasing by 6.1%.

Domestic tourism is an important contributor to the tourism sector. In 2024, Mexico recorded 108.1 million domestic overnight trips, which is 6.3% above the level in 2019.

Tourism governance

The Secretariat of Tourism within the Ministry of Tourism is responsible for formulating, leading and evaluating national tourism policy, and co-ordinating with other ministries and levels of government. This includes promoting innovation in the sector, improving the quality of tourism services and the competitiveness of national tourism, and promoting strategies that articulate governmental priorities and contribute to the sustainable and inclusive growth of tourism. Framework agreements and ongoing co-operation with state and municipal authorities enable destination planning and management, and the ongoing implementation of sustainability and quality schemes and professionalisation of the sector. FONATUR is Mexico's agency for the development of tourism investment.

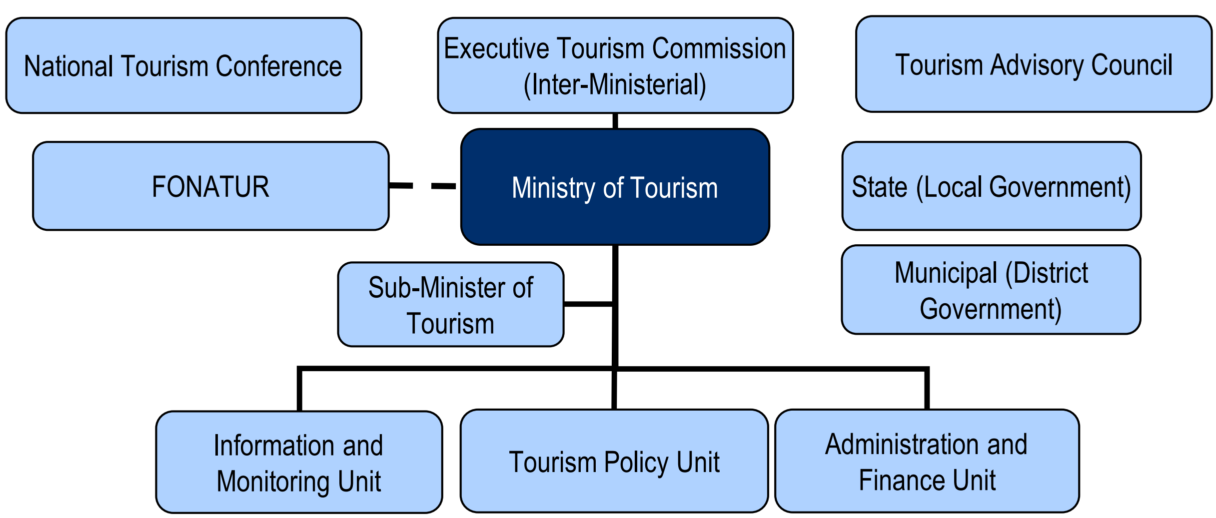
Three co-ordination mechanisms contribute to formulating strategies and actions to achieve comprehensive development of national tourism activity. These mechanisms are:

- The Executive Tourism Commission, an inter-ministerial body whose purpose is to fully understand and resolve tourism-related matters.
- The Tourism Advisory Council, whose purpose is to suggest strategic responses and co-ordinate actions with the agencies of the Federal Government, with the full participation of the public and private sectors, to achieve comprehensive development of tourism activity.
- The National Tourism Conference, a co-ordinating body between the three levels of government, oversees policy, planning and programming of tourist activity throughout Mexico.

In the Ministry of Tourism, the Great Council for tourism sustainability has been established. The Council brings together more than 130 participants from across government, international organisations, civil society, indigenous communities, social enterprises, private companies and academia.

The total tourism budget in 2025 was MXN 1.77 billion

Mexico: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Tourism, 2026.

Tourism policies and programmes

The National Tourism Policy Framework 2024-2026 provides a coherent federal framework for tourism in Mexico and operates within the broader strategic orientation established by the Sectoral Tourism

Programme 2025–2030, aligned with the National Development Plan. The Framework aims to strengthen destination planning and management, embed environmental and social sustainability and climate resilience, raise competitiveness through quality standards and digitalisation, promote inclusive benefits and skills, and improve co-ordination and evidence-based policy in Mexico. Issue-specific and economy-wide policies, including on key issues such as climate, mobility, urban development, and culture and heritage, interact with tourism through inter-ministerial mechanisms and co-ordination agreements.

Tourism destination planning and management is a key priority for Mexico. To support destinations, technical assistance and guidance is provided for the development of destination plans along with capacity building for local DMO functions (see box below). These efforts are supported by planning toolkits and analytical instruments to assess visitor pressure and destination carrying capacity, which are being applied on a selective basis according to local needs and institutional capacity to enable destination decision making.

To improve the sustainability and climate resilience of the tourism sector, Mexico has implemented sustainability standards and good-practice protocols and is supporting the integration of climate risks into planning. The distinctive 'S' Quality Seal provides recognition for businesses adopting verified sustainable practices and is aligned with schemes like Earth Check and Rainforest Alliance. Tourism businesses that can obtain the "S" badge include accommodation providers, restaurants, airports, convention centres, golf courses and tourism transport operators. Ecosystem-based climate adaptation measures and sustainable tourism spatial planning approaches are being developed and applied through certification processes and selected destination-level initiatives, in co-ordination with environmental and territorial planning authorities to preserve tourist attractions and infrastructure in destinations.

Tourism certification systems extend beyond sustainability and offer an opportunity to improve competitiveness and quality for tourism in Mexico. Quality and certification programmes are being expanded and now include the National Tourism Quality Distinction, accreditation for tourist guides, Treasures of Mexico, sustainability (Distinctive S), hygienic food handling (Distinctive H), modernisation and specialised segments. These are being integrated into a national Tourism Certification Portal designed to centralise certification processes, reduce administrative fragmentation, improve transparency and facilitate compliance and quality assurance across different certification schemes. The Portal is primarily intended for tourism businesses and service providers seeking certification, and public authorities responsible for managing, validating and monitoring certification programmes.

Mexico is promoting technological innovation, aiming to meet the needs of increasingly informed and demanding travellers. In addition to providing diagnostics and toolkits to support digital adoption by tourism businesses, work is being undertaken to promote data sharing and the use of administrative data for policy. The DataTur portal has been strengthened to include sections related to tourism regulations, state and municipal tourism GDP, estimates of income and lodging taxes, a national tourist price index, and regional digitalisation of tourist vocation places. This free portal provides users transparent, timely information about the sector for analysis and better decision making. The National Tourism Registry has also been digitalised, providing a consultation tool for tourists to increase certainty and security of tourist services.

Better spreading the benefits of tourism across communities can create a more inclusive sector, including for women and youths. Mexico has developed several initiatives promoting inclusion, including skills partnerships with education and training bodies, support for community-based tourism and updating the National Code of Conduct to Protect Children in Travel and Tourism. The code of conduct is a voluntary sector commitment to prevent sexual and labour exploitation of minors, which has been updated with new guidance and sector agreements.

Supporting tourism destination planning in Mexico

Many tourism destinations in Mexico continue to face pressure on infrastructure, the environment and local communities. To address diversity and varied governance capacity of destinations, Mexico has developed a common toolbox for destination planning. The toolbox, which acts primarily as a destination planning and governance support instrument, includes a model terms-of-reference; practical guide to integrate sustainability and climate criteria, templates for stakeholder engagement, and a light monitoring, measurement and evaluation framework aligned with national policy objectives. Cross-ministerial inputs are embedded throughout the planning templates and the terms-of-reference, which require destinations to consider transport, environmental, cultural and territorial dimensions. These inputs are incorporated through existing inter-ministerial co-ordination mechanisms and consultation processes, rather than through the creation of new institutional structures.

The toolbox is made available to states and municipalities through existing institutional channels, including inter-governmental co-ordination mechanisms, technical assistance processes led by the Secretariat of Tourism, and capacity-building activities such as workshops and training sessions. In some cases, support from entities such as FONATUR is provided for project identification and evaluation.

Rather than being deployed as a standalone digital platform, the toolbox is integrated into ongoing territorial planning processes, tourism project development, and the preparation of state and municipal Tourism Development Programmes.

The toolbox approach is expected to improve comparability and speed up the preparation of tourism destination management plans across Mexico. The plans are currently being scaled with states and municipalities and embedded in inter-governmental agreements. Future iterations plan to deepen the use of data and integration of climate-risk modules into planning.

Mexico - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/wmsv1g

Netherlands

Netherlands: Key tourism messages 2026

Tourism direct GVA (2024)	Tourism direct employment (2024)	Travel exports (2024)
4% of total GVA (up 0.1 percentage points since 2023)	5.5% of total employment (up 0.1 percentage points since 2023)	6.8% of total service exports (up 0.1 percentage points since 2023)

National tourism strategy: Perspective 2030

National tourism administration: Ministry of Economic Affairs and Climate (as of February 2026)

National tourism budget: EUR 10.5 million (2025)

Key tourism policy priorities and actions:

- *Fostering future-proof sector development* – Creating conditions for responsible visitor growth, both domestic and international, that benefits entrepreneurs and society.
- *Strengthening collaboration with the tourism sector* – Maintaining the National Council for Recreation and Tourism, which brings together businesses, governments, and knowledge institutions to work jointly on strategic issues.
- *Fostering destination development and management – S*upporting destination management in provinces and regions, emphasising integrated spatial and economic development to fit the regional scale and identity to create positive social impact.

Tourism in the economy and outlook

Tourism is an important contributor to the Dutch economy. In 2024, tourism contributed EUR 40.1 billion to GVA in nominal terms, increasing 9.5% compared to 2023, and equivalent to 4.0% of total GVA. The tourism sector provided 458 000 jobs, or 5.5% of total employment, which was 1.3% more jobs than in 2023. Travel exports represented 6.8% of total service exports in 2024.

In 2024, the Netherlands welcomed a record 21.3 million international tourists in commercial accommodation establishments, an increase of 4.8% compared to 2023. The top international source markets were Germany (35%), Belgium (12%) and the United States (10%). International arrivals grew by 4.9% in 2025.

Domestic tourism continues to grow, with a record high of 30.0 million domestic tourists in commercial accommodation establishments in 2024, a 3.1% increase on 2023 levels. Domestic tourism expenditure amounted to EUR 58.7 million in nominal terms, or 57.2% of total tourism expenditure.

Tourism governance

The Ministry of Economic Affairs is responsible for tourism at the national level and acts as a first contact point within government for tourism industry associations and stakeholders.

The Netherlands Board of Tourism and Conventions (NBTC) is the national DMO and works on the country's tourism positioning, development, and marketing, in close collaboration with public and private sector stakeholders. Their aim is to turn the Netherlands into a liveable, popular, and valuable destination for residents, visitors and businesses.

Regional and local authorities are responsible for tourism policy at their respective levels, often with their own strategy or a joint strategy with other municipalities. They receive and distribute funding locally and are responsible for marketing nationally and internationally and product development.

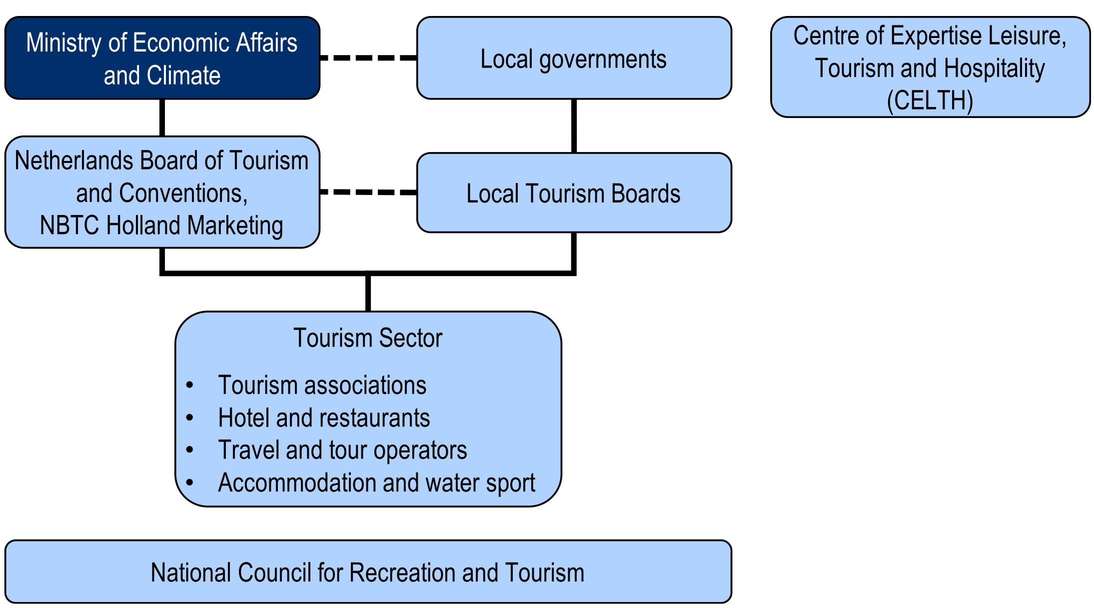
Destination Nederland, founded in 2022, is a network of local destination and city marketing organisations in the Netherlands. The network aims to strengthen destination management and marketing through knowledge sharing, and increase the appeal of the Netherlands as a destination to visit and stay for residents, visitors and companies.

The Centre of Expertise Leisure, Tourism & Hospitality is a collaboration between universities of applied sciences in the field of tourism. The aim is to stimulate public-private partnerships in knowledge and research to encourage collaboration between education, industry and government.

The National Council for Recreation and Tourism (Landelijke Raad voor Recreatie en Toerisme) brings together businesses, governments and knowledge institutions to work jointly on strategic issues within the hospitality and tourism sectors. The Council was formed in 2024 after a positive evaluation of the National Taskforce on Leisure and Tourism created during COVID-19.

The Netherlands Board of Tourism and Conventions is partially funded by the Ministry of Economic Affairs. In 2025, a total of EUR 10.5 million was allocated by the Ministry to the Board, in addition to third-party funding for specific projects. There is no budget allocated for tourism at the national level beyond that allocated to NBTC.

Netherlands: Organisational chart of tourism bodies



Source: OECD, adapted from Ministry of Economic Affairs, 2026.

Tourism policies and programmes

The Netherlands' long-term tourism strategy, Perspective 2030, continues to guide the tourism sector. Developed in 2019, the Strategy shifts the focus from increasing visitor numbers to improving the quality of tourism, ensuring that the benefits of tourism are broadly shared and that negative impacts are mitigated. The ambition is to strengthen the hospitality and tourism sector in a way that supports regional identity, liveability, and long-term resilience.

To focus on the policy priorities and actions at the national level, the Ministry of Economic Affairs is guided by the National Policy Framework for the Tourism and Hospitality Sector. The core actions under this Framework include:

- Strengthening collaboration within the sector by stimulating and facilitating collaboration among public and private actors. This includes multi-level governance and stakeholder co-ordination. A key milestone is the establishment of the National Council for Recreation and Tourism (Landelijke Raad voor Recreatie en Toerisme) in 2025, a platform that brings together businesses, governments, and knowledge institutions to work jointly on strategic issues.
- Fostering future-proof sector development by promoting inclusive prosperity and creating conditions for responsible visitor growth, both domestic and international, that benefit entrepreneurs and society alike, including through themes like recreation and integrating tourism into spatial policy.
- Supporting destination development and management by working with provinces and regions to provide research and specific programmes for destination management, with the aim of creating positive social impact and contributing to regional development and well-being. Emphasis is placed on integrated spatial and economic development that fits the regional scale and identity.
- Utilising knowledge-based policy by promoting the use of digital tools and data to help the sector become more efficient, adaptive, and insight-driven, including through the Data Offensive for Tourism (see box below). This contributes to smarter decision making, targeted policy interventions, and improved monitoring of trends and impacts.
- Towards a climate-resilient hospitality sector: We map the impact of climate change on the Dutch tourism sector and translate this into targeted recommendations and action plans for businesses and governments.
- Better integrating recreation and tourism into spatial policy by working with the sector to clarify the (spatial) development challenges for recreation and tourism and how they can be intelligently combined with other major challenges such as housing construction, nature development, or the agricultural transition through ongoing consultation and workshops.
- Contributing to international tourism agendas through participation in the EU and G20, with the aim of strengthening national priorities by connecting to global initiatives. International co-operation also facilitates knowledge exchange, innovation, and sustainable tourism transitions.

The Framework is implemented through a mix of direct support, including funding for NBTC, co-financing of regional projects, and strategic collaboration with regional governments. There is no single earmarked tourism budget, but resources are mobilised through sectoral and interdepartmental programmes. The Framework brings together provincial and municipal governments, the Netherlands Board of Tourism and Conventions, the National Council for Recreation and Tourism, knowledge institutions, tourism associations and entrepreneurs, and international partners (e.g. EU, OECD).

Becoming more digitally fit with the Digital Offensive for Tourism in the Netherlands

Digitalisation is essential for a strong, future-proof tourism and hospitality sector. Yet, the sector still lacks the knowledge, time and resources to adapt. Through the Digital Offensive for Tourism (DOT) programme, a sector specific adaption of the national vision "Digital Expedition", the Ministry of Economic Affairs and the NBTC are collaborating to broaden and fast track the sector's digital foundation, making it more resilient and enabling it to optimally respond to new digital developments.

The DOT is designed to be both accessible and practical. Entrepreneurs are provided with a free QuickScan that provides insights into their digital fitness. From this, they can choose personal coaching or access to a central online learning environment with AI technology and ongoing support. Topics such as online visibility, booking systems, customer data, digital security and marketing, are specifically addressed. Providing a stronger digital infrastructure can enable the sector to improve service delivery and strengthen its competitive position.

The Programme is being introduced in three phases:

- Phase 1 (Q4 2025–Q2 2026): Pilot launch in two regions, digital scan, e-learning platform, live coaches.
- Phase 2 (Q3–Q4 2026): Training of the AI coach and further scaling up.
- Phase 3 (Q1 2027–Q2 2027): Nationwide scaling up.

Netherlands - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/kb8w35

New Zealand

New Zealand: Key tourism messages 2026

Tourism direct GVA (2024-25)	Tourism direct employment (2024-25)	Travel exports (2024-25)
4.6% of total GVA (up 0.1 percentage points since 2023-24)	6.8% of total employment (up 0.3 percentage points since 2023-24)	51.6% of total service exports (up 5 percentage points since 2023-24)

National tourism strategy: Tourism Growth Roadmap

National tourism administration: Ministry of Business, Innovation and Employment

National tourism budget: NZD 374 million

Key tourism policy priorities and actions:

- Attracting international tourists – Increased marketing to international visitors aiming to reach 3.9 million by 2026 and attracting business and other major events.
- *Developing the tourism workforce* – Improving attraction, retention and productivity across the sector to strengthen the tourism and hospitality workforce.
- *Upgrading tourism infrastructure* – Investing in the infrastructure of key attractions including the Milford Road Corridor and the Totara River Rail Bridge.

Tourism in the economy and outlook

Tourism is a cornerstone of New Zealand's economy, serving as the country's second largest export. In the financial year ended March 2025, tourism generated NZD 18.0 billion, directly contributing to 4.6% of total GVA. Tourism directly employed 194 600 people, accounting for 6.8% of total employment. Tourism jobs are critical in many of New Zealand's regions, with 55% of jobs in tourism located outside of Auckland, Wellington and Canterbury. Travel exports represented nearly 52% of total service exports in the year ended March 2025.

In 2025, there were 3.4 million international overnight visitors (91% of pre-pandemic 2019 levels), with the top three markets being Australia (45%), the United States (11%) and China (8%). New Zealand recorded 25.8 million domestic guest nights in all means of accommodation in 2025, up 0.2% on the previous year.

Tourism also brings significant non-financial benefits to New Zealand by supporting regional development, helping to preserve the natural environment, and supporting global connectivity through people-to-people linkages. 94% of New Zealanders surveyed in 2024 agreed that tourism is good for the country.

Tourism governance

The Ministry of Business, Innovation and Employment (MBIE) advises central government, via the Minister for Tourism and Hospitality, on supporting the tourism sector. The Ministry works closely with other government agencies whose portfolios intersect with the tourism sector, including the Department of Conservation, Department of Internal Affairs, Ministry for Culture and Heritage and Ministry of Transport. Tourism New Zealand, a Crown Entity, markets the country as a visitor destination internationally in partnership with industry and Regional Tourism Organisations (RTOs).

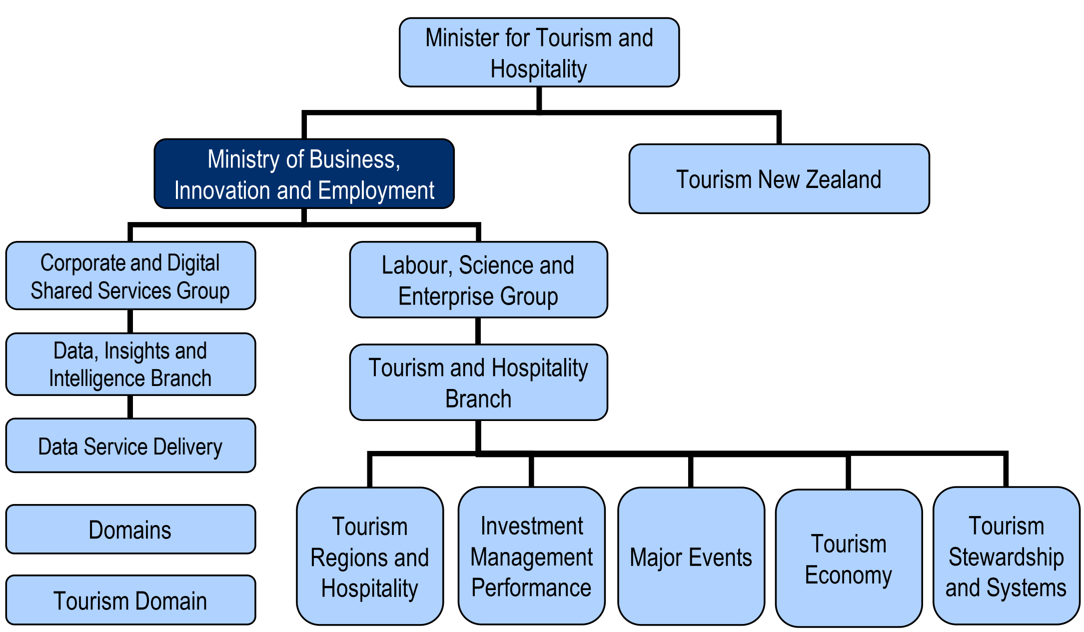
Local and regional authorities provide tourism-related infrastructure and local planning frameworks to help communities grow and manage local tourism challenges. RTOs are responsible for promoting and managing tourism in specific regions. In recent years, RTOs have also assumed leadership in bringing together local stakeholders to develop Destination Management Plans to ensure their destinations are well-managed and sustainable. RTOs are largely funded and governed by local councils with some RTOs receiving additional funding from other sources, including central government, annual membership fees from local industry and industry partnership funding.

Vertical co-ordination is achieved through a shared understanding of key strategic documents, strong relationships with key destinations and regular discussions with Regional Tourism New Zealand and/or Local Government New Zealand.

In the 2025-26 financial year, the Minister for Tourism and Hospitality is responsible for appropriations of just over NZD 184 million and NZD 190 million of revenue from the International Visitor Conservation and Tourism Levy (IVL). Levy revenue from 2025/26 will be allocated as follows:

- NZD 35 million per year for new discretionary tourism spending.
- NZD 55 million per year for new discretionary conservation spending.
- NZD 8 million per year for Ngā Haerenga, the New Zealand Cycle Trail Fund.
- The remainder of revenue collected (estimated to be around NZD 92 million) will partially fund Tourism New Zealand and the Department of Conservation.

New Zealand: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Business, Innovation and Employment, 2026.

Tourism policies and programmes

The Tourism Growth Roadmap, announced in June 2025, outlines New Zealand's strategic vision and plan to boost tourism, drive economic growth and enhance the visitor experience. The Roadmap currently has three major objectives:

- Increase the number of international visitors to at least 2019 levels (3.89 million) by the end of 2026.
- Double the value of 2023 tourism exports by 2034 (from NZD 9.9 billion to NZD 19.8 billion).
- Grow the number of New Zealanders in tourism and hospitality jobs.

The Roadmap will be updated annually, initially focusing on stimulating tourism demand and shifting over time to focus more on the supply-side of the tourism system and supporting visitor growth. There are seven major workstreams underpinning the Roadmap:

- Workforce: An industry-led workstream to ensure New Zealand has a skilled, resilient, and future-ready tourism and hospitality workforce. Work has been done to understand the impact of systemic factors like the seasonality of work and poor pay and conditions for the tourism workforce (see box below).
- Mixed-use tourism infrastructure: Effectively developing and maintaining mixed-use infrastructure across New Zealand to provide the best experiences to international visitors and support long-term tourism growth.
- Regions and communities: Setting up regions and communities to manage and invest in the tourism system, including by exploring opportunities that enable a more co-ordinated and consistent approach.
- Tourism system funding: Ensuring the system is financially resilient, responsive to changing demands and capable of delivering consistent value to visitors, communities, businesses and the environment. The Government is procuring independent research on priorities for tourism system funding flows.
- System co-ordination and data: Future-proofing the tourism system's structures and responsibilities, and providing timely, high-quality data can be used to support growth across the tourism system. The Government and the Tourism Data Leadership Group have worked through procurement of the priority data sets and contracted providers for delivery.
- Visitor experience: Ensure visitors can access high-quality tourism and hospitality experiences and accommodation.
- Aviation and cruise connectivity: Ensure aviation and cruise settings are fit for purpose and enable international connectivity. Improving aviation connectivity is aligned with the 2025 Aviation Action Plan, which sets out a shared industry and government ambition for an efficient, resilient and innovative aviation sector. To enhance cruise connectivity, initiatives include establishing a regular Cross-Government-Industry Cruise Forum, developing a prototype hull cleaning system, and undertaking a systematic review of cruise fees and levies to ensure the cruise tourism settings enable growth in both cruise ship deployments to New Zealand and value across regions from shore visitation.

In 2025-26, NZD 35 million from the International Visitor Conservation and Tourism Levy – a NZD 100 levy charged to most international visitors with the aim to address current challenges in the tourism and conservation systems – has been committed to fund Roadmap initiatives. NZD 27.5 million has been invested in demand-side initiatives including increased international marketing in core and emerging markets such as Australia, the People's Republic of China and the United States, to attract additional business events, and secure more major events. The remainder has been allocated to the upgrading of tourism infrastructure to improve visitor experiences and reduce congestion, including improvements to the Milford Road corridor and the Totara River Rail Bridge on the West Coast Wilderness Cycle Trail.

At the regional level, each RTO has a Destination Management Plan (DMP) which brings together different stakeholders to achieve the common goal of developing a well-managed, sustainable visitor destination. It is an ongoing process that requires destinations to plan for the future and consider the social, economic, cultural and environmental risks and opportunities. The Plans each set out the specific challenges and opportunities for their region, as agreed by tourism businesses, local residents (including local Māori communities), local governments and other stakeholders. Initial Plans were funded by central Government but developed and implemented locally (including resourcing). The continued implementation of the DMPs is a local responsibility.

Tackling tourism workforce challenges in New Zealand

The New Zealand tourism and hospitality workforce has consistently faced challenges with recruitment and retention of new workers, which can be attributed to systemic factors like the seasonality of work, and poor pay and conditions.

To better understand the impact of these issues on the workforce, the Ministry of Business, Innovation and Employment, led by researchers at Auckland University of Technology, conducted an anonymous survey of over 900 tourism and hospitality workers in 2022. The survey results provided an evidence base for the prevalence of specific tourism and hospitality workforce issues to inform future response initiatives.

In 2024 and 2025, subsequent surveys were conducted to provide insights into changes in employment conditions. Information was collected about the contractual and relational nature of employment relationships in the tourism and hospitality sector, including wages, conditions and employment experiences. Questions related to thriving at work, employee well-being and environmental sustainability were also included.

Overall, these surveys have provided an evidence-base for policy development, directly informing workforce initiatives aimed at improving employment conditions and attractiveness of employment in the sector. They have also fostered sector-wide engagement with ongoing collaboration between government, industry and academia.

New Zealand - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/4m1fjb

Norway

Norway: Key tourism messages 2026

Tourism direct GDP (2019)	Tourism direct employment (2019)	Tourism exports (2024)
3.6% of total GDP (up 0.2 percentage points since 2018)	7.3% of total employment (up 0.1 percentage points since 2018)	13.9% of total service exports (up 1.6 percentage points from 2023)

National tourism strategy: Roadmap for the Tourism Industry (2024)

National tourism administration: Ministry of Trade, Industry and Fisheries

National tourism budget: NOK 175 million (2026)

Key tourism policy priorities and actions:

- *Developing sustainable and attractive destinations* – Supporting communities to have the right infrastructure for sustainable tourism growth, including introducing the Act on Visitor Fees to provide funds to municipalities to finance public goods.
- *Marketing Norway as a tourist destination* – Undertaking targeted marketing to attract the most profitable and sustainable customer segments to Norway, and developing a 'Global Growth' programme for the tourism sector.
- *Developing quality tourism products* – Developing a broad range of profitable tourism products to increase their visibility in key markets and introducing new standards for tour guides.

Tourism in the economy and outlook

Prior to the pandemic, the economic contribution of the tourism sector in Norway had increased considerably, reaching NOK 128.1 billion in 2019 and representing 3.6% of total GDP. Tourism was also a significant employer, particularly in rural areas, providing over 182 900 full-time jobs, or 7.3% of national employment in the same year. In 2024, travel exports represented 13.9% of total service exports, compared to 13.5% in 2019, and a pandemic low of 4.7% in 2021.

International tourism has recovered strongly. In 2025, Norway recorded 14.2 million international overnight stays in commercial accommodation establishments, surpassing the level in 2019 by 32%. The top source markets were Germany (18%), United States (12%) and Sweden (9%).

Domestic tourism for both leisure and business purposes dominates the tourism sector in Norway, accounting for 26.4 million domestic nights in commercial accommodation in 2025, which equates to 65% of all nights in commercial accommodation. This is 8% above 2019 levels.

Tourism governance

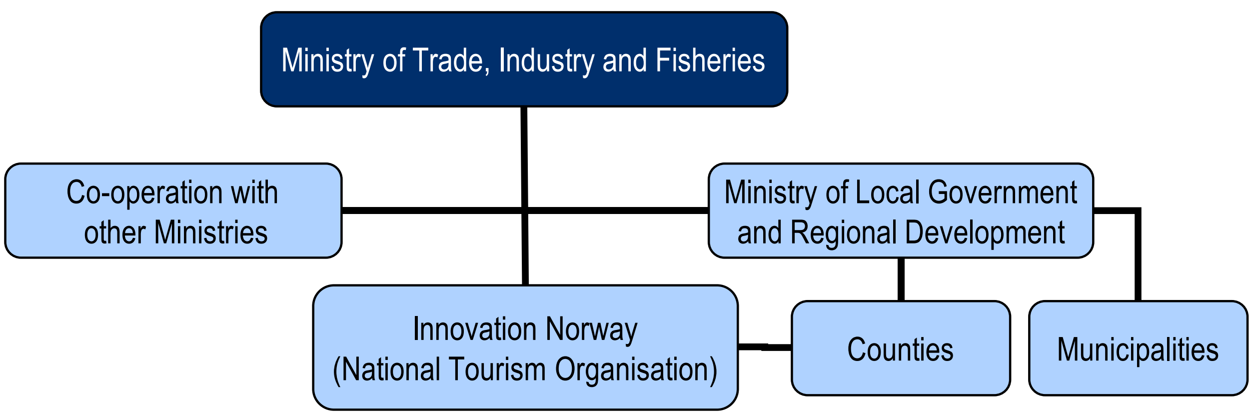
The Ministry of Trade, Industry and Fisheries is responsible for developing and regulating tourism. The Ministry co-operates closely with other ministries on tourism issues, including:

- The Ministry of Local Government and Regional Development, which provides oversight of regional and local authorities promoting tourism development.
- The Ministry of Climate and Environment and the Ministry of Transport, which develops policies for a more sustainable tourism sector. It is responsible for planning and regulating infrastructure, utilities, national parks and natural and cultural heritage attractions.
- The Ministry of Agriculture and Food, which promotes co-operation between farmers and food producers, restaurants and other sectors of the tourism sector.

Innovation Norway is the country's national tourism organisation and is responsible for meeting economic growth targets for tourism and international marketing. It is primarily funded by the Ministry of Trade, Industry and Fisheries but also receives funding from other ministries.

In 2026, Innovation Norway receives a total of NOK 175 million for its tourism-related activities. Innovation Norway allocates loans, grants, and guarantees to travel and tourism companies. In 2024, a total of NOK 162.6 million was allocated in pledges to the tourism sector.

Norway: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Trade, Industry and Fisheries, 2026.

Tourism policies and programmes

The national 'Roadmap for the Tourism Industry' aims to facilitate a tourism sector that is competitive, has a decreasing climate and environmental footprint, respects the tolerance limits of nature and local communities, and contributes to profitable year-round jobs and attractive destinations throughout the country. The Roadmap has three focus areas, which are the core of the government's tourism policy:

- Develop profitable products and an increasingly attractive tourism offer in Norway.
- Develop Norwegian destinations in a more sustainable direction.
- Develop international marketing efforts in a strategic manner, in line with ambitions for Norwegian tourism.

The Roadmap has over 40 measures, covering a range of themes, to contribute to achieving these goals. The themes include climate and environment, labour market, knowledge and expertise, transport networks, emergency preparedness and digitalisation. The measures include destination management, research and innovation, and financing of tourism related public goods.

The rapid growth in visitor numbers to some Norwegian regions has created the need to better manage the development of tourism. To help develop sustainable and attractive destinations, attention has turned towards developing tools to better manage tourism, including financing tourism-related infrastructure and creating models for co-operation between different actors at the destination level. The Roadmap emphasises the key role that municipalities play in steering the development of destinations. As such, it is important for municipalities to possess a good knowledge of destination development and the capacity to co-operate with the tourism sector. Many municipalities and regions have recognised the need to finance tourism-related public goods such as litter removal, path maintenance and cleaning of public toilets. To support these activities, the Act on Visitor fees was adopted in 2025. The purpose of the Act is to help finance tourism-related public goods through visitor fees in areas with a particularly high burden from tourism. The revenue from the fee will be distributed in its entirety to the municipalities (see box below).

A new model for destination development and visitor management in Norway

Norway's Parliament adopted a new Act on Visitor Fees on 10 June 2025, after wide public consultation. The purpose of the Act is to help finance tourism-related public goods though visitor fees in areas with a particularly high burden from tourism. It provides these municipalities with a new tool to deal with the challenges that can arise due to growth in tourism.

The law contains:

- A voluntary municipal accommodation fee.
- A legal basis that allows the government to introduce a tax on cruise activities.
- A legal basis that allows the government to introduce a visitor fee for Longyearbyen.

The voluntary accommodation fee is 3% excluding VAT. The Act allows for seasonal adjustment, allowing for an overnight fee to be introduced for all or some months of the calendar year.

The revenue from the accommodation fee will go back in its entirety to the municipalities, so they can cover tourism-related public goods such as garbage disposal, cleaning of toilets, signage and facilitation of hiking trails for the benefit of both locals and other visitors.

Municipalities that introduce overnight fees must prepare a plan for the use of the revenues. The plan must contain a description of the tourism sector in the municipality and the challenges associated with high visitor numbers and justify why the introduction of the voluntary accommodation fee and the use of the revenues are in line with the purpose of the Act. The Ministry must approve the plan prior to introducing the overnight fee.

It has been decided that the law will enter into force on 1 July 2026. The government has also submitted proposals for a cruise fee and a visitor's fee in Longyearbyen for public consultation. In addition, the government is consulting on supplementary regulations related to the accommodation fee.

Norway's sustainable destinations and authentic experiences provide opportunities for further development and growth of the tourism sector. Targeted marketing can help contribute to the sustainable development of tourism by attracting the desired customer segments.

Another priority area for Norway is to develop a broader range of profitable tourism products and increase their visibility in key markets. The development of year-round tourism products can not only reduce seasonality, but also make it easier to recruit and retain skilled labour. Ensuring that these products and experiences meet the quality needs of visitors is vital to creating a prosperous tourism sector, and the introduction of new standards can help in this regard. For example, a Norwegian Standard for Guides would enable the Government to ensure increased professionalism, quality and safety in guided tourism experiences. In 2025, Standards Norway established a standardisation committee to develop a draft standard that will describe the basic competences for all tour guides, including the importance of local knowledge, safety, risk management and emergency preparedness. Funds from the Ministry of Trade Industry and Fisheries was committed to complete the process. The standard has been through a public consultation, but it has not yet been finalised and formally approved by Standards Norway.

Norway - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/jxlgub

Poland

Poland: Key tourism messages 2026

Tourism direct GDP (2024)	Tourism direct employment (2024)	Travel exports (2024)
2.6% of total GDP (same share as in 2023)	2.0% of total employment (same share as in 2023)	11.9% of total service exports (down 1.9 percentage points since 2023)

National tourism strategy: forthcoming

Responsible government agency: Ministry of Tourism and Sport

National tourism budget: PLN 114.9 million (2024)

Key tourism policy priorities and actions:

- *Developing an integrated, long-term tourism strategy* - Working with key stakeholders to create strategies across 12 specific subsectors of tourism and developing the National Tourism Strategy.
- *Supporting tourism data and digitalisation* – Building and maintaining the Tourism+ data portal and the system of Public Registers on Tourism.
- *Improving resilience to climate change* – Revitalising degraded national parks and nature reserves in regions of tourist importance and the promoting solutions to support eco-tourism and sustainable tourism.

Tourism in the economy and outlook

Tourism is an important driver of the Polish economy. In 2024, the tourism sector was estimated to be worth PLN 173.2 billion and to have generated 4.8% of the country's GDP (including direct and indirect revenues). The accommodation and food services sector employed 144 100 people in full-time equivalent jobs, an increase of 5.3% compared to 2023. Travel exports amounted to PLN 56.0 billion, accounting for 11.9% of total service exports in 2024. In nominal terms, this was a decrease of 11.2% compared to 2023.

In 2024 the number of international overnight tourists reached 19.7 million, an increase of 3.9% compared to 2023. Germany remains the largest source market accounting for 32% of international arrivals, followed by Ukraine (18%), the United Kingdom (5.5%) and Belarus (3%). International arrivals increased by 8.6% to 21.4 million in 2025.

Domestic tourism remains an important part of the sector. In 2024, the number of domestic tourist trips reached 52.9 million, including 21.4 million long-term trips (more than 4 overnight stays) and 31.4 million short-term trips (1-3 overnight stays), which was 1.3% higher than in 2023.

Tourism governance

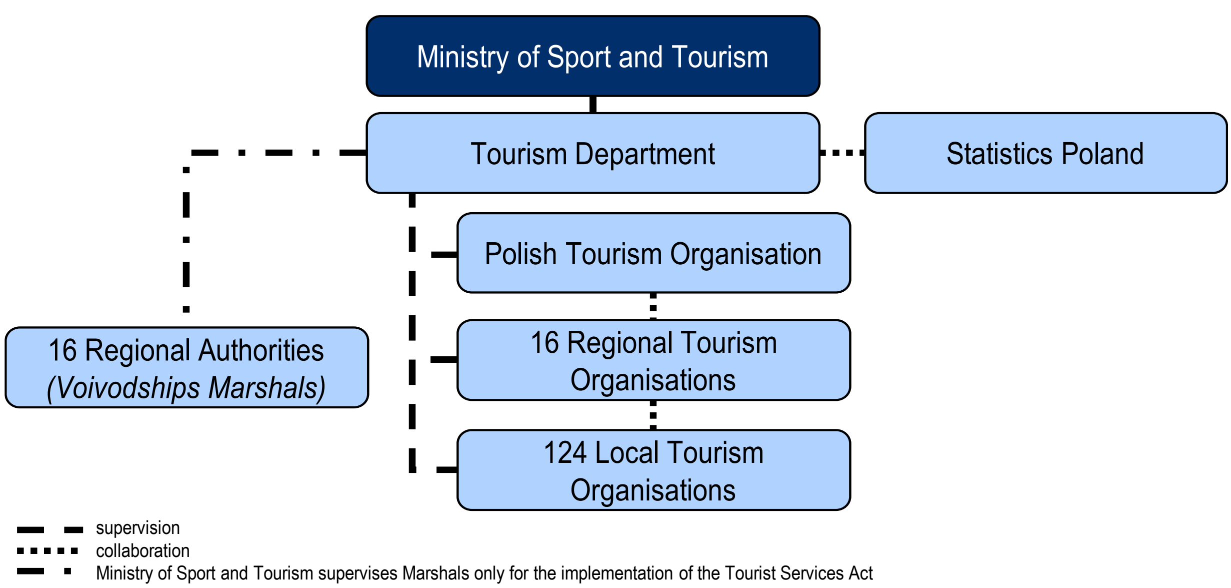
The Ministry of Sport and Tourism is responsible for the management, legislation, and regulation of tourism in Poland. The Ministry also supervises the Polish Tourism Organisation, which is responsible for the marketing and promoting of Poland as a tourist destination, as well as developing and operating the Polish tourism data system. The Polish Tourism Organisation has tourism offices in 16 established and emerging markets, and co-operates with tourism organisations and other entities involved in regional tourism promotion and development. Due to Russia's war of aggression against Ukraine, the work of the Polish tourism office in Kyiv has been suspended.

At the regional level, tourism development is the responsibility of regional and local governments. Poland's 16 Regional Tourism Organisations and 124 Local Tourism Organisations co-ordinate between local and voivodeship (i.e. regional) governments and representatives of the tourism sector. The joint activities focus on developing tourism products and the tourism data system, consumer marketing, national and international promotion, and the development and modernisation of infrastructure.

The Tourism Expert Council was reactivated in September 2025, acting as an advisory and consultative body for the Minister of Sport and Tourism. Its key tasks include providing advice on proposals to support the tourism sector, strategic consulting, and initiating activities to foster digitisation, sustainable development, and innovation.

The State budget for tourism in Poland is increasing. In 2024, PLN 114.9 million was allocated to tourism, including PLN 88.2 million for the Polish Tourism Organisation. This represents an overall increase of 4.2% compared to 2023 when the budget for tourism was PLN 110.3 million and the Polish Tourism Organisation received PLN 84.5 million.

Poland: Organisational chart of tourism bodies



Source: OECD, adapted from the Sport and Tourism, 2026.

Tourism policies and programmes

The 'Report on the State of Tourism Economy in Poland and the National Tourism Policy goals until 2030 with an Outlook until 2036' was drawn up in 2024. This report allowed Poland to better understand the key tourism subsectors and future policy goals. Poland is now intending to develop 12 specific subsector strategies with the participation of non-governmental organisations and other stakeholders to make up its lead document, the National Tourism Strategy. The subsector strategies will be based on the following themes: meetings, international conferences and events; hotels, restaurants and catering; the Poland Brand; nature; cycling; spa; organised and packaged tours; water; culinary; rural; horse-riding and cultural tourism. The National Tourism Strategy will propose solutions for innovation, improving quality of human resources, sustainable development and the country's promotion.

Poland also has the 'Management Strategy for Integrated Marketing Communication in Tourism until 2030', developed by the Polish Tourism Organisation. The goals of the Strategy include increased visibility of Poland as a tourist destination, effective management of marketing communication, professionalisation of promotional activities, an increased focus on market segmentation, co-operation with regions, sustainable development of tourism, and increased support for innovation and digitalisation. The Strategy integrates communication and promotion activities for government, tourism organisations and stakeholders.

Digitalisation of the Polish tourism sector, including the development of public statistics for tourism, and investment in solutions based on AI, Big Data and virtual and augmented reality, is a key priority. The 'Tourism+' web portal was launched in 2024 to monitor f tourism trends and develop data-driven tourism policy. The system of Public Registers on Tourism provides reliable information to allow tourists and tourism professionals to verify legally operating accommodation facilities. In addition, a new project has been funded to utilise these databases and others to monitor the size and direction of tourist flows using AI (see box below).

The green and digital transformation of tourism, including adaptation to climate change are necessary to increase tourism resilience and sustainability. For Poland, this includes practices like the decarbonisation of tourism, promotion of sustainable forms of tourism and circular economy practices, investing in the blue and green economies and building infrastructure that is resilient to extreme weather conditions. Other areas of focus include supporting eco-labelling, providing sustainable mobility solutions and utilising digital technologies to better manage resources and optimise customer experience.

In 2024, the Polish Tourist Organisation co-ordinated the 'Poland is ECO' project to promote and disseminate the principles of sustainable development and pro-ecological behaviour. The best European Destinations of Excellence (EDEN) were promoted using the National Tourist Portal and social media. Workshops, training sessions and presentations promoted the concept of an eco-friendly lifestyle and work in tourism. A promotional project on Cooperation-Innovation-Sustainable Tourism aimed to raise public awareness through discussions, debates and the exchange of good practices on the implementation and development of sustainable tourism at many levels. Between 2023 and 2024, conferences were organised in each of the 16 regions of Poland, with reports developed for each, promoting branded tourism products that implement the principles of sustainable development and utilise the wealth of our country's natural assets.

Financing activities to protect national parks and nature reserves is needed to increase resilience to climate change and to promote eco-tourism, and to support pro-environmental and sustainable tourism activities. Poland intends to revitalise degraded areas in regions of tourist importance and promote solutions to support eco-tourism and sustainable tourism (e.g. cycling infrastructure and hiking routes within the 'Tourism without Barriers". Over PLN 6.5 million was allocated to this program from the Physical Culture Development Fund in 2023, followed by PLN 5 million in 2024, and approximately PLN 6 million is planned for 2025).

The issue of safety and security of visitors to Poland is a priority. The Polish Presidency of the Council of the European Union, which ran from 1 January to 30 June 2025, focused on enhancing European security. The slogan selected to represent Poland abroad is 'Security, Europe!'. After the introduction of temporary restrictions in 2024, tourist interest in offers on Poland's Eastern border declined. To help revive tourism and promote the region as a safe and attractive destination the Podlaskie Voivodeship Tourist Voucher was introduced. The voucher enabled domestic tourists living outside of the region to apply for accommodation subsidies.

In response to the urgent need to restore the functionality of tourist facilities in areas affected by severe floods in September 2024, the Tourism Infrastructure Reconstruction Programme (PLN 70 million) was launched to support investments to reconstruct or renovate existing tourist facilities and accompanying infrastructure that were damaged or destroyed by natural disasters. The reconstructed technical and functional solutions are required to meet modern safety and accessibility standards. The programme is aimed to effectively rebuild physical structures and restore tourism and recreation events in selected regions. The 'Programme to Counteract the Effects of the September 2024 Floods – Tourism Promotion of the Affected Regions' (PLN 2.5 million) aims restore the positive image of the affected regions through promotional activities that rebuild demand for tourism services.

Promoting attractive destinations also requires quality tourism products. The Tourism Support Programme provides financial and non-financial support for the development of digital services, communication and promotion, and to improve employee qualifications to enhance the quality of tourism services. The funding amounted to PLN 12.6 million between 2023-2025. Co-funding was provided for projects in the field of tourism, including the development and promotion of regional and active tourism, digital transformation, improving professional qualifications and implementing strategic activities such as increasing tourist safety during holidays in Poland (e.g. in the mountains and on the water). The Best Tourist Product competition is also organised to identify businesses that provide top-quality tourist services in accordance with current regulations.

Embracing the digital transition for research in Poland

Poland is working to utilise digital tools to better understand and monitor the tourism sector across multiple projects. The Tourism+ web portal, launched by Statistics Poland, is an innovative and interactive tourism data tool that allows policymakers to track changes, monitor trends and compare data at different levels of the country's administrative division. The portal combines data from official surveys, public statistics and booking portals. It has built in algorithms that can forecast changes in the use of accommodation establishments, monitor trends and help to plan tourism policy effectively. The Tourism+ portal is linked to the national System of Public Registers on Tourism, which also includes the National Register of Accommodation Establishments.

Another project aims to develop an IT solution, utilising advanced AI and algorithms, to help monitor the size and directions of tourist flows in real time, supporting sustainable tourism growth. The tool will pull information from the modernised register of accommodation establishments, booking systems, government and administration systems (including the Civil Aviation Authority), payment card transactions and mobile network data. The combined data will allow for the AI tools to make forecasts which can correlate with external data. The project will also help to measure the effectiveness of promotion tools and to develop instruments that stimulate the growth of tourism in Poland. In the future, the platform is expected to provide basic data on recommended investment projects.

Poland - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/q7xalc

Portugal

Portugal: Key tourism messages 2026

Tourism direct GVA (2024)	Tourism direct employment (2023)	Travel exports (2024)
8.1% of total GVA (equal to share in 2023)	12.1% of total employment (up 1.8 percentage points since 2022)	47.9% of total service exports (up 0.2 percentage points since 2023)

National tourism strategy: 2027 Tourism Strategy (currently under review)

National tourism administration: Ministry of Economy and Territorial Cohesion

National tourism budget: EUR 481 million (2025)

Key tourism policy priorities and actions:

- *Transitioning toward a more sustainable and territorially balanced model of tourism development* – Moving beyond traditional sustainability discourse to adopt a systemic approach that integrates environmental responsibility, social equity, and economic resilience.
- *Promoting a more regenerative and circular model of tourism* – Developing the Climate Agenda for Tourism 2025-2030 to integrate sustainability into destination planning, regional investment, and business support.
- *Developing, retaining and diversifying talent across the tourism sector* – Addressing immediate labour shortages, including through migration, and reversing structural weaknesses in workforce qualification, professional attractiveness, and long-term sector commitment.

Tourism in the economy and outlook

Tourism continues to play a vital role in Portugal's economic structure, as a leading export sector and a key source of employment. In 2024, the sector generated EUR 27.7 billion in travel exports, representing almost half of all service exports (47.9%). Tourism accounted for 8.1% of total GVA in 2024 and directly accounted for 542 200 jobs in 2023, representing 12.1% of total employment.

In 2024, Portugal recorded a total of 88.3 million nights in all means of accommodation, a 3.8% increase compared to 2023. This was driven by international visitors, accounting for 59.8 million nights (68%) across 20.5 million tourists. The top markets in 2024 were Spain (13%), the United Kingdom (12%) and Germany (10%). It is estimated that inbound tourist arrivals increased by 1.4% in 2025. Domestic visitors spent 28.5 million nights in all means of accommodation, a 1.7% increase from 2023.

Tourism governance

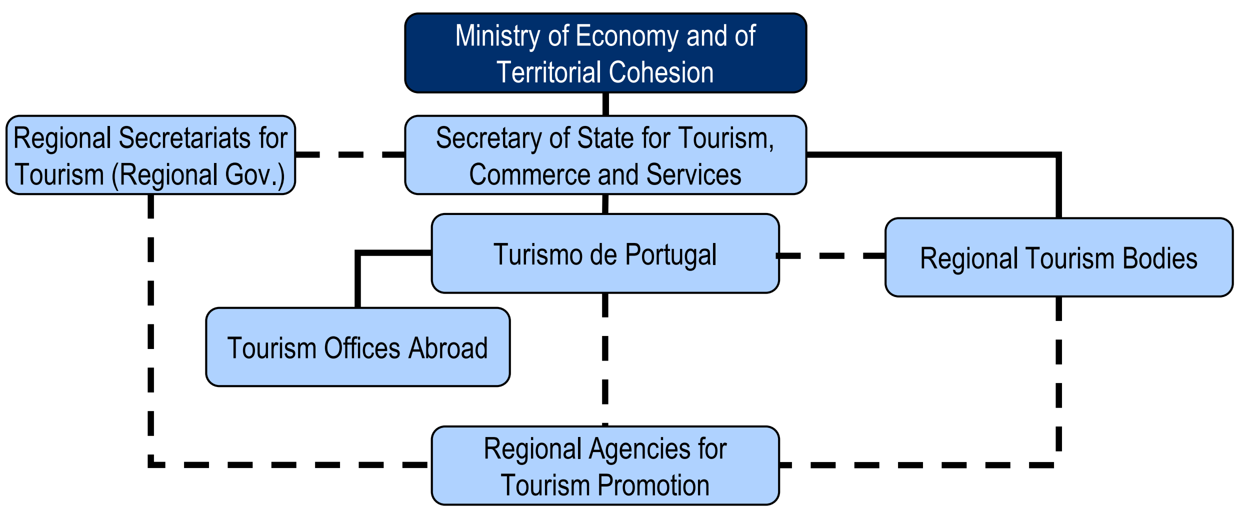
The Secretary of State for Tourism, Commerce and Services sits within the Ministry of Economy and of Territorial Cohesion. Turismo de Portugal is the national tourism authority and responds to the Secretary of State for Tourism. It is responsible for national tourism policy, promotion, training, investment, valuation and sustainability of tourism activities.

At the regional level, Portugal has five Regional Tourism Bodies acting as DMOs with financial and administrative autonomy. These regional bodies are responsible for domestic promotion and product development. There are also two Regional Directorates for Tourism covering the autonomous regions of Madeira and the Azores, with political and administrative autonomy.

Turismo de Portugal develops and implements international promotion initiatives in co-ordination with seven Regional Tourism Promotion Agencies. The regional promotion agencies are non-profit, private law associations with Regional Tourism Body and private sector membership. They have a formal contractual relationship with Turismo de Portugal for developing promotional activities in international markets.

The total budget of Turismo de Portugal in 2025 was EUR 481 million (operating costs and overheads included), of which half came from dedicated taxes (gambling tax) and the remaining coming from EU Structural Funds and other public funding sources.

Portugal: Organisational chart of tourism bodies



Source: OECD, adapted from Turismo de Portugal, 2026.

Tourism policies and programmes

Tourism in Portugal is guided by the Tourism Strategy 2027, approved in 2017 to be in effect for the following decade. However, despite the effects of the pandemic, the economic targets defined in the Strategy were achieved by the end of 2024.

In 2025, a strategic reflection process was initiated to define a new tourism policy instrument for the next decade (2035). The process involved an in-depth diagnosis of the state of tourism development in Portugal, with sessions held in all regions of the country to hear from local stakeholders. Thematic sessions were also held, bringing together experts in fields such as the environment, communities, culture, technology, employment, market, mobility, and territory.

This exercise enabled us to reach a consensus on the purpose of the future strategy: to enhance competitiveness and value creation while promoting a more balanced development model, with a stronger impact on economic activity and residents' quality of life.

The new Tourism Strategy 2035 will provide a stable, long-term reference framework to guide tourism development in Portugal over the next decade. It will aim to position Portugal among the world's most competitive and sustainable tourism destinations. The strategy will be structured around three overarching objectives: value creation, balanced development and competitiveness, and will be operationalised through 12 strategic initiatives (see box below).

While the Tourism Strategy 2035 is still in the final stages of preparation, a number of strategic initiatives aligned with its core objectives are already being developed. These initiatives are laying the foundations for the future strategy and will play a key role in its implementation.

One example is the Climate Agenda for Tourism 2025-2030, designed as an action plan focused on decarbonising and building the sector's resilience. This Agenda will aim to consolidate the ambition of carbon-neutral, resilient, and regenerative tourism capable of generating economic, social and environmental value, and reinforce Portugal's competitiveness as a tourist destination of excellence and trust, in a constantly changing global scenario. A Community Development Agenda will also contribute to promoting sustainability in the sector, especially in its social pillar, with the purpose of creating added value for residents and enhancing their perception of tourism. These plans aim to operationalise sustainability and climate action at all levels of the tourism value chain, reinforcing Portugal's commitment to a more inclusive, climate-resilient, and territorially balanced tourism model.

In parallel with the forthcoming Climate Agenda for Tourism, a new national programme will support shared value for both tourists and local populations through a more integrated model of destination development. This ensures territorial cohesion, strengthens community identity, and enhances the relationship between visitors and residents. The initiative will support the development of inclusive and distinctive tourism experiences that reflect the authenticity of each place, prioritising cultural heritage, gastronomy, nature, and water-related assets, while guaranteeing accessibility, safety, and autonomy for all, including vulnerable groups.

The "Integrar para o Turismo" pilot programme was launched in 2024 (EUR 2.5 million investment) to complement the Agenda for Tourism Professions. This programme aims to support the structured integration of migrant workers into the tourism labour market by combining technical training, Portuguese language support, and employer intermediation to facilitate legal, professional, and social integration.

Portugal is actively working to strengthen support for tourism SMEs through a combination of public and private initiatives. Business capacity-building and incubation programmes offer technical training, mentoring, and access to strategic tools to help small enterprises professionalise and scale operations. Through co-operation with public agencies, regional development agencies, and business associations, further initiatives are being launched to encourage the aggregation of micro-enterprises into collaborative networks and clusters, especially in territories where fragmentation has hindered growth and diversification. In parallel, public procurement policies and innovation platforms are being reviewed to increase the participation of tourism SMEs in collective innovation processes, while aligning with environmental, social, and digital transformation goals.

Principles for a new tourism policy vision in Portugal

The new tourism policy vision for Portugal is guided by a set of core principles that reflect the need to reconcile competitiveness, sustainability and territorial cohesion. These principles provide the foundation for a more resilient, innovative and inclusive tourism model, capable of generating long-term value for the economy, communities and destinations.

- Value-driven tourism development: Tourism policy should prioritise the creation of higher economic value, increasing productivity and strengthening tourism's contribution to national prosperity.
- Tourism aligned with territorial cohesion: Tourism should contribute to territorial cohesion, enhancing the attractiveness of all regions, reducing regional asymmetries and promoting more balanced spatial development.
- Community-centred tourism: Tourism development should enhance the quality of life of residents, promote inclusive governance and ensure that local communities actively benefit from tourism activity.
- Environmental sustainability and climate resilience: Tourism policy should promote responsible resource management, climate adaptation and the protection of natural and cultural assets, ensuring the long-term sustainability of destinations.
- Talent and skills as a foundation of sector competitiveness: Strengthening human capital should be a priority, through investment in skills, improved working conditions and greater attractiveness of tourism careers.
- Competitive and innovative tourism businesses: Public policy should support the modernisation, digitalisation and productivity of tourism enterprises, particularly SMEs, fostering innovation and long-term competitiveness.
- Authentic and diverse tourism experiences: Tourism development should valorise local identity, culture and heritage, creating distinctive and accessible experiences across the territory.
- Knowledge, technology and collaboration as enablers of transformation: The transformation of tourism should be supported by data-driven decision making, technological adoption and strong collaboration between public institutions, businesses, academia and communities.

Portugal - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/ybruk3

Slovak Republic

Slovak Republic: Key tourism messages 2026

Tourism direct GDP (2023)	Employment in tourism industries (2023)	Travel exports (2024)
2.4% of total GDP (up 0.4 percentage points since 2022)	7.0% of total employment (equal to share in 2022)	12.2% of total service exports (up 0.2 percentage points since 2023)

National tourism strategy: National Sustainable Tourism Strategy in Slovakia for 2035

Responsible government agency: Ministry of Tourism and Sports

National tourism budget: EUR 41.7 million (tourism support) and EUR 17.2 million (promotion) (2026)

Key tourism policy priorities and actions:

- *Tourism sustainability and climate resilience – P*romoting sustainability and climate resilience in tourism with targeted funding, awareness and planning tools, including the introduction of sustainability criteria for public tourism funding evaluations.
- *Improving tourism skills and quality of service* – Creating education programmes in co-operation with employers to better align skills with real-world needs and undertaking skills forecasting to help identify future workforce demands.
- *Developing digital data tools to modernise tourism management and planning* – Building national tourism data platforms (e.g. e-Visitor, Passportisation) integrating mobile data, accommodation statistics and online booking systems.

Tourism in the economy and outlook

Tourism is an important strategic sector for the Slovak Republic. In 2023, tourism directly generated EUR 2.9 billion in GDP, or 2.4% of the national GDP, representing a 36% increase in nominal terms compared to 2022. Tourism industries accounted for 169 500 jobs in the economy, remaining stable compared to the previous year. Travel exports were EUR 1.6 billion in 2024 and represented 12.2% of total service exports, which is similar to 2023.

International tourism continued to recover in 2025, with 2.4 million international tourists recorded in commercial accommodation establishments, representing an increase of 11.8% compared to 2024. Record numbers of visitors were observed particularly in January, February, August and December. The increase in international arrivals towards the end of the year can be partly attributed to the launch of new air routes. The main source markets remained neighbouring countries, with Czechia (29%), Poland (16%) and Germany (7%) of total international arrivals.

Domestic tourism continues to play a key role in the Slovak Republic, although its growth is slower compared to the international segment. In 2025, 3.9 million domestic tourists were recorded in commercial accommodation establishments, representing a year-on-year increase of 4.6%.

Tourism governance

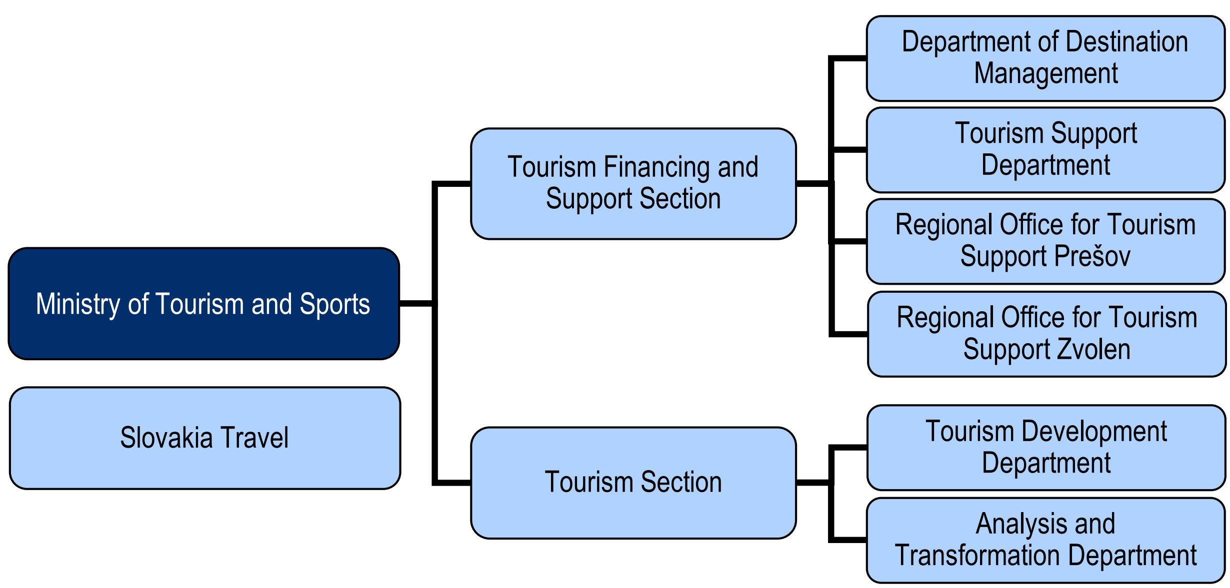
The Ministry of Tourism and Sports of the Slovak Republic was established in February 2024, shifting tourism responsibilities from the Ministry of Transport. The Ministry of Tourism and Sports participates in various ministerial committees dealing with issues impacting tourism, including the Working Group to Co-ordinate the Presentation of Slovakia Abroad, the Interdepartmental Commission of the Geo Parks Network, the Impact and Adaptation Steering Group, and the Working Group of the Government Council for Vocational Education and Training.

Slovakia Travel was established in 2021 as the National Tourism Organisation responsible for tourism marketing and promotion as well as a tourism data centre. The Slovak Tourism Association includes representatives from the main tourism organisations and promotes co-operation in the sector and advises on legislative changes.

At local and regional levels, tourism associations contribute to quality improvement, professional training, and the sharing of best practices. The Slovak Republic also delegates tourism responsibilities for the development of tourism products and promotion to self-governing local and regional DMOs in eight regions and municipalities. There are 39 local and 8 regional DMOs in the Slovak Republic.

The Ministerial budget for direct support of the tourism sector is EUR 21.7 million in 2026, which includes EUR 19.3 million allocated for subsidies to the 47 local and regional DMOs, mainly for marketing, product development and tourism infrastructure. The Tourism Support Fund provides an additional EUR 20 million. The budget for Slovakia Travel is EUR 17.2 million in 2026 for marketing campaigns aimed at domestic and international markets and promotional activities.

Slovak Republic: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Tourism and Sports, 2026.

Tourism policies and programmes

The Slovak Republic is finalising the National Sustainable Tourism Strategy in Slovakia for 2035. The new Strategy aligns with the European Commission's Transition Pathway for Tourism. It aims to increase the competitiveness of tourism and better use its potential to balance regional disparities and create new jobs. The Strategy sets priorities and goals to improve digitalisation, social sustainability and resilience in the tourism sector and will focus on important areas for sustainable development, including:

- A competitive tourism sector that is ready for green and digital transformation.
- Resilient destinations that provide quality stays for visitors and quality of life for residents.
- A functional and flexible tourism management model.

Sustainability, climate resilience and the green transformation remain key priorities for the Slovak Republic. The upcoming national tourism strategy will align with EU climate goals, promoting nature-based tourism, circular economy principles, and sustainable infrastructure, helping destinations and businesses adapt to climate change while preserving natural and cultural assets.

The Slovak Republic is promoting sustainability and climate resilience in tourism through targeted funding, awareness, and planning tools. This includes support for adaptive infrastructure, strategic product diversification, and better integration of tourism into climate adaptation and regional development policies. Sustainability criteria will also be included as part of public tourism funding evaluations. Support is shifting away from snow-dependent infrastructure in low-altitude mountain areas toward year-round, climate-resilient products like hiking, wellness, and cultural tourism. The government is also working to raise awareness among stakeholders about climate risks and to encourage long-term planning that accounts for changing weather patterns, natural hazards, and ecosystem limits.

The Tourism Support Fund was established with the main objective of developing and modernising tourism infrastructure. In 2025, a funding call was issued to support the development of sustainable and competitive tourism in the regions of up to EUR 500 000 (total allocation of EUR 19 million). Eligible activities included the development of tourism infrastructure (cultural, recreational, natural and sports infrastructure), improvement of local visitor infrastructure, development of tourism routes, support for health tourism, and water-based recreational infrastructure. The call applied to tourism projects well aligned with the Tourism Support Fund Act to support the economic, environmental and social sustainability of tourism, and/or to construct, modernise or reconstruct sustainable and resilient tourism infrastructure.

Green transition efforts in tourism focus on reducing environmental impacts at the operational level and encouraging sustainable business practices. This includes support for energy efficiency upgrades and incentives for waste reduction and water-saving technologies. Low-emission transport options, such as cycling infrastructure and improved public transit to tourist sites, are being supported. Tourism businesses will be supported through awareness campaigns and technical guidance to help them adopt greener practices and public funding will prioritise projects that demonstrate measurable environmental benefits. These initiatives aim to embed sustainability into everyday tourism operations and contribute to the broader shift toward a low-carbon economy.

To address labour shortages and improve service quality, the Slovak Republic is updating its tourism education and training system by revising vocational education and training programmes in co-operation with employers to better align skills, expanding dual learning opportunities to provide on-the-job experience, improving career guidance and developing campaigns to attract young people. Efforts also include employer engagement and targeted support for upskilling and reskilling the workforce, and skills forecasting to help identify future workforce demands. Skills forecasting is supported through an analysis of occupational changes carried out within the national Sector-Driven Innovations for an Efficient Labour Market project, the use of graduate forecasting models developed using data from the national Centre for Scientific and Technical Information – to predict the number and structure of graduates entering the labour market in fields relevant to tourism – and trend analysis related to sustainability and digital transformation to identify emerging job roles and the need for new skill sets (e.g., sustainability management, environmentally responsible supply chains, digital operations). These mechanisms provide a structured approach to identifying future workforce needs and informing updates to curricula and policy planning.

The Slovak Republic also recognises that the development of digital tools can help to modernise tourism management and planning. Efforts aim to support data-driven decision making, improve visitor services, and strengthen the capabilities of regional and local tourism actors include:

- Short-term rentals register, which will improve oversight and transparency of accommodation services via increased regulation on the provision of data by hosts.
- eVisitor platform to digitise visitor registration and enhance the quality of tourism statistics, building on the short-term rentals register.
- Passportisation project, which is creating a detailed digital map of all tourism points of interest across the country to help inform the allocation of financial support, plan the development of tourism infrastructure, and identify the untapped potential of specific areas.

To reduce regional disparities, support is being provided to develop tourism in under-visited and rural areas through targeted grant schemes and infrastructure investments. Funding is focused on developing cultural, nature-based, and wellness tourism products that attract visitors beyond traditional destinations and peak seasons. Strengthened co-operation with regional and local tourism organisations is working to improve destination branding, co-ordination, and marketing capacity. Special attention is given to promoting year-round tourism offers, such as hiking, cycling, gastronomy, and local heritage experiences. These efforts aim to diversify the national tourism offer, support local economies, and reduce pressure on overcrowded destinations – ultimately contributing to more balanced and inclusive tourism growth across the country.

Driving regional tourism through cultural preservation in the Slovak Republic

Slovakia launched the national project "People & Castles – a step towards a social economy", jointly co-ordinated by the Ministry of Labour, Social Affairs and Family and the Ministry of Culture to address the underutilisation and poor condition of many historic castles and cultural monuments, particularly in rural regions. Many of these sites suffer from deteriorated infrastructure, limited accessibility and lack of visitor services, which hinders their tourism potential. High unemployment in these regions further exacerbates social and economic disparities. The project aims to preserve cultural heritage while supporting local employment and stimulating regional tourism.

The project provides jobs to a potential 141 043 jobseekers who have been unemployed for more than one year by engaging them in the restoration and maintenance of approximately 30 castles and historical sites across the country. Participants are employed in roles such as apprentice, co-ordinator, and foreperson. Their wages and materials are co-financed through EU funds under Programme Slovakia. The initiative fosters collaboration between municipalities, NGOs, church organisations, and other local stakeholders. The initiative created approximately 450 new job positions, with 418 people employed in the first implementation phase, helping to revitalise around 30 castles.

This initiative not only contributes to the restoration of neglected heritage sites but also enhances their value for tourism, supports seasonal tourism employment, and strengthens local engagement. It provides an example of a way to connect heritage conservation, social inclusion, and regional tourism development through targeted policy interventions.

Slovak Republic - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/ne724a

Slovenia

Slovenia: Key tourism messages 2026

Tourism direct GDP (2023)	Tourism direct employment (2024)	Travel exports (2024)
5.2% of total GDP (up 0.2 percentage points since 2022)	7.5% of total employment (up 0.1 percentage points since 2023)	26.7% of total service exports (down 0.9 percentage points since 2023)

National tourism strategy: Strategy of Slovenian Tourism 2022-2028

Responsible government agency: Ministry of Economy, Tourism and Sport

National tourism budget: EUR 26.2 million

Key tourism policy priorities and actions:

- *Enhancing the operating environment for tourism businesses* – Considering price positioning and higher value-added tourism products to increase the international competitiveness of Slovenian tourism providers and improve their operational efficiency.
- *Investing in tourism infrastructure* – Supporting the development and redevelopment of tourism infrastructure with a focus on high-quality and environmentally sustainable tourist accommodation that maintain long-term market relevance.
- *Improving sustainable mobility* – Reducing emissions from Slovenian tourism by strengthening accessibility and sustainable mobility options.

Tourism in the economy and outlook

Tourism is a key contributor to the Slovenian economy. Tourism's direct contribution to national GDP in 2023 reached 5.2% or EUR 3.3 billion, a 16.1% increase compared to 2022. Tourism-related industries employed almost 70 400 persons in 2024, accounting for 7.5% of the total workforce and an increase of 1.1% compared to 2023. Travel exports represented 26.7% of total services exports (or EUR 33.4 billion) in 2024 but remained below the pre-pandemic levels of 33%.

In 2025, Slovenia was visited by a record 7.0 million international and domestic tourists, an increase of 6.2% compared to 2024. The total number of overnight stays reached 17.8 million, marking a 5.9% increase over the previous year. At the same time domestic tourism declined slightly with 0.6% fewer arrivals and 0.5% fewer overnight stays. The largest share of international overnight stays was generated by tourists from Germany (15.3%), followed by Italy (8.9%), Austria (8.0%), Croatia (5.8%), and the Czech Republic (5.8%).

Tourism governance

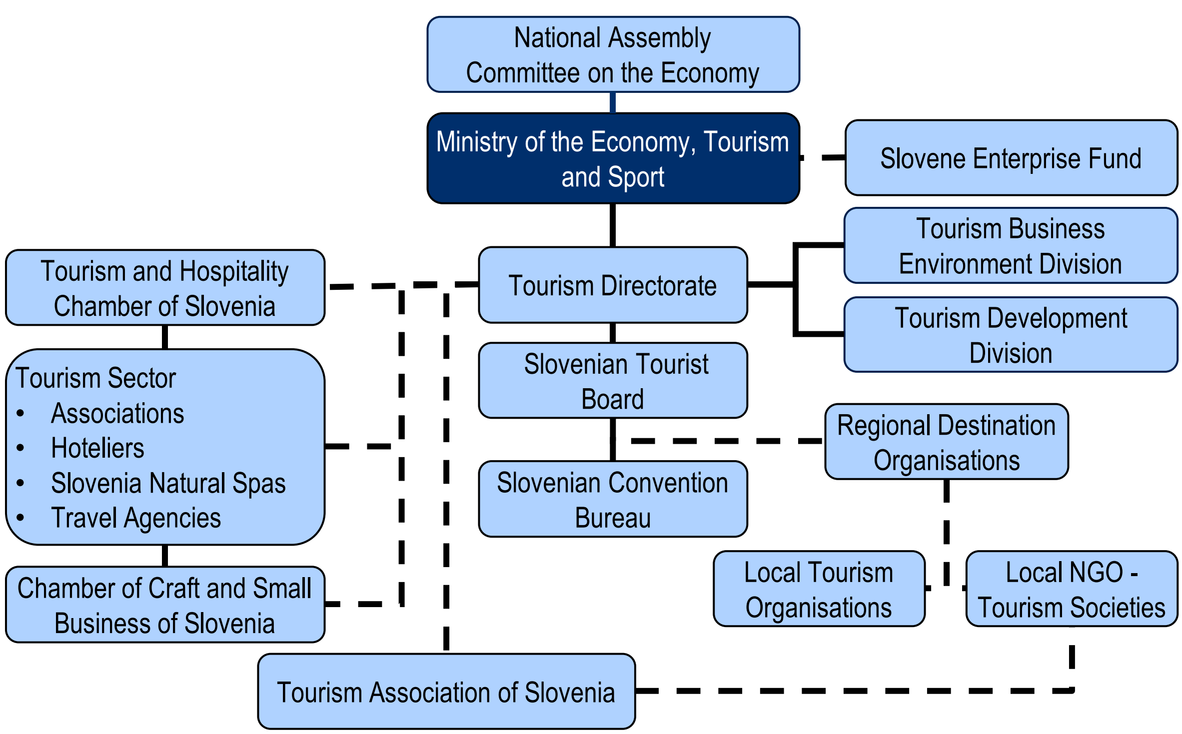
The Ministry of Economy, Tourism and Sport is the responsible governmental body for tourism policy and its implementation. The Tourism Directorate is divided into the Tourism Development Division and the Business Environment in Tourism Division. The Ministry assures the legal framework for better tourism governance and stimulates the business environment for tourism SMEs, encourages co-operation between public and private stakeholders and ensures the effective management of the tourism budget.

The Tourism Council is the main political body for co-ordinating tourism policy and consists of government and industry representatives. The Ministry co-operates and consults with the Tourism and Hospitality Chamber of Slovenia, the Chamber of Craft and Small Business of Slovenia and other representatives of the tourism sector, including the Tourist Association of Slovenia, which is a national non-governmental organisation comprised of more than 600 local tourism associations.

The Slovenian Tourist Board is a public agency responsible for the marketing of Slovenia's tourist products and services, and the programme for enhancing the sustainable development of Slovenian tourism. The Tourism Board acts on an annual work programme funded by the national tourism budget, and is responsible for programme activities related to collecting and sharing data to support the green and digital transformation of tourism, conducting research and surveys, tourism marketing and knowledge promotion, developing products and strengthening destination management by supporting networking in the tourism ecosystem.

The State tourism budget dedicated to tourism in 2025 amounted to EUR 26.2 million of which EUR 14.7 million was allocated to implementing the Slovenian Tourism Board work programme.

Slovenia: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of the Economy, Tourism and Sport, 2026.

Tourism policies and programmes

The Slovenian Tourism Strategy 2022-2028 sets the guiding principles for tourism development in Slovenia. In its simplest form, it aims to create a green and boutique tourism sector, with a smaller footprint, that provides more value for everyone. The Strategy has 102 measures within ten policies. The Strategy’s Action Plan, currently in the implementation phase, includes eight of the policies from the Strategy. The Strategy relies on horizontal co-ordination, with all relevant Ministries and institutions required to report their progress. As of February 2026, four measures have been fully implemented, 82 are in the implementation phase, and 5 will not be implemented. The Tourism Strategy is complemented by the Strategy for the Digital Transformation of Slovenian Tourism 2022-2026. These two strategies were developed simultaneously, with the goals of the Digital Transformation Strategy embedded in the Tourism Strategy.

A core priority for Slovenia is creating an operating environment where tourism businesses can thrive, helping to channel private investment and create better quality and higher value-added products. The key challenge is to increase the international competitiveness of Slovenian tourism providers and improve their operational efficiency and support environmental sustainability at the destination level. To support this, Slovenia co-funds certification and re-certification of sustainability certificates, such as Green key or EU-ECOLABEL.

During the 2022–2028 strategic period, the policy to support private investments focuses on increasing total value-added in the tourism sector by 43% (from EUR 0.9 billion to EUR 1.3 billion); increasing value-added per employee in the core tourism industry by 31% (to EUR 38 429); and achieving higher growth in value-added per employee in the accommodation sector by 64% (to EUR 59 618). The targets set are considered to be ambitious but achievable with the right measures and activities.

Investing in public infrastructure, nature and culture is planned to improve Slovenia’s tourism offer. This policy is aligned with Slovenia’s goals under the EU Recovery and Resilience Plan for Slovenia. This funding has supported public and shared infrastructure projects that enhance tourist destinations and improve the overall visitor experience. These projects have included upgrades to public tourism infrastructure, destination facilities, access points, interpretation centres, and other amenities that contribute to higher-quality, more sustainable and better-managed destinations. In 2025, most projects were approaching completion, with preparations underway for new proposals to further link tourism infrastructure with cultural heritage, green transition goals and integrated destination development, ensuring continuity beyond the initial recovery period.

A separate funding initiative targeting tourist accommodation facilities was published at the end of 2024 to support the complete renovation of existing facilities and the construction of new, high-quality and environmentally sustainable accommodation. Projects were required to meet a strict criterion related to quality standards, energy efficiency, sustainability and long-term market relevance. Successful proposals were selected in mid-2025, with investments contributing to the modernisation of accommodation infrastructure, increased capacity in higher-quality segments and Slovenia’s positioning as a sustainable, boutique and experience-oriented tourism destination.

Ensuring the sufficient supply, knowledge and value of human resources in the tourism sector is pivotal to enabling and supporting the green, digital, quality and value transition of Slovenian tourism. The approach to the human resources development policy includes short-term actions to normalise the business in the first period of the tourism strategy's validity and long-term human resources development measures to increase the value of Slovenian tourism. The Ministry, in co-operation with the Slovenian Tourism Board and educational institutions, is responsible for promoting tourism careers through the 'Kariera v turizmu' programme. The Ministry also participates in career fairs across Slovenia and offers professional internships to tourism students.

The proposed development policy on accessibility and sustainable mobility is one of the major upgrades of the existing national tourism Strategy, with a goal to significantly reduce emissions from Slovenian tourism. The development of sustainable and zero-emission forms of mobility for visitors and goods (green supply chains) will need to be supported across all levels. The policy will consider key elements including: reducing the number of private cars (running on fossil fuels); upgrading the integrated public passenger transport system to meet tourism needs; and redefining Slovenia's priority forms of accessibility according to the carbon footprint per passenger and the value-added of each market. Horizontal co-ordination allows the tourism sector to draw on existing programmes to improve accessibility and sustainable mobility (see box below).

Tourism information remains pivotal for the effective management of the sector. The National Information Centre for Tourism was officially launched in June 2025. The Centre is part of a horizontal development policy led by the Slovenian government in the field of digitalisation which collects all available tourism data and makes it publicly available to shareholders. It provides 30 practical use cases (e.g. specific functionalities or operations enabled by the system based on available data and indicators), which are presented through more than 70 interactive visualisations.

Improving sustainable mobility with horizontal co-ordination in Slovenia

Sustainable mobility is a key focus of the Slovenian Tourism Strategy 2022-28, however, it is a core competence of the Ministry of the Environment, Climate and Energy rather than the Ministry of Economy, Tourism and Sport. The goal is to significantly reduce emissions from Slovenian tourism through initiatives such as improving railway and bus connections with near markets, developing cross-border infrastructure for cycling and hiking, improving traffic strategies within destinations, creating mobility plans for enterprises and increasing e-mobility. While further targeted action will be required, horizonal co-ordination and effective use of existing programmes provides real opportunities for progress in the tourism sector. Examples include:

- The Co-financing of Municipal Sustainable Urban Mobility Plans (SUMPs) by the Ministry of Cohesion and Regional Development. The aim of the call was to support the introduction and promotion of integrated transport planning and to steer local authorities towards the development of sustainable transport solutions. This is achieved through the development of SUMPs, which provide a framework for the long-term and systematic implementation of measures promoting sustainable mobility at the local level, including for tourists.
- Co-financing of the installation of publicly accessible charging infrastructure for electric vehicles by the Ministry of the Environment, Climate and Energy and co-financed under the Recovery and Resilience Plan. The objective is to establish a geographically dispersed network of publicly accessible charging infrastructure for electric vehicles across all statistical regions of Slovenia. Through this call, co-financing is provided for the deployment of publicly accessible charging infrastructure, with eligible beneficiaries including hotels and similar establishments.

Slovenia - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/71nsjm

Spain

Spain: Key tourism messages 2026

Tourism direct GDP (2023)	Tourism direct employment (2025)	Travel exports (2024)
6.0% of total GDP (up 0.2 percentage points since 2022)	13.4% of total employment (down 0.1 percentage points since 2024)	48.4% of total service exports (up 1.2 percentage points since 2023)

National tourism strategy: Spain Tourism 2030 Strategy

Responsible government agency: Ministry of Industry and Tourism

National tourism budget: EUR 277.1 million (2023)

Key tourism policy priorities and actions:

- *Transforming and renewing tourism destinations* – Strengthening the management capacity of destinations and improving collaborative multi-level governance
- *Promoting balanced co-existence between residents and visitors* – Improving social cohesion in destinations and utilising environmental actions to improve resident perceptions of tourism.
- *Enhancing labour conditions and talent development* – Addressing challenges related to working conditions and worker well-being while strengthening the tourism skills necessary for the green and digital transitions.

Tourism in the economy and outlook

Tourism is a key sector of the Spanish economy and an important driver of socio-economic development. Tourism directly accounted for 6.0% of GDP in 2023. Travel exports represented 48.4% of total service exports in 2024, an increase of 1.2 percentage points from 2023, and confirming tourism's strong contribution to Spain's balance of payments. In 2025, tourism directly employed 2 975 000 registered workers, representing 13.4% of the total workforce, and an increase in the number of people employed in tourism of 1.9% compared to 2024.

International tourism continued its upward trajectory in 2025, with arrivals reaching a record 96.8 million (provisional data), up 3.2% from 2024 levels. The United Kingdom (19.7%), France (13.2%) and Germany (12.4%), together, accounted for nearly half of the total international arrivals.

Domestic tourism showed signs of stabilisation. In 2024, domestic arrivals totalled 138.3 million, a slight decrease of 0.8% compared to 2023, while total nights spent reached 634.3 million, 1.5% below the previous year.

Overall, recent data indicate that Spain has consolidated its recovery and continues to position itself among the world's leading tourism destinations, with sustained growth in international demand and strong labour market performance.

Tourism governance

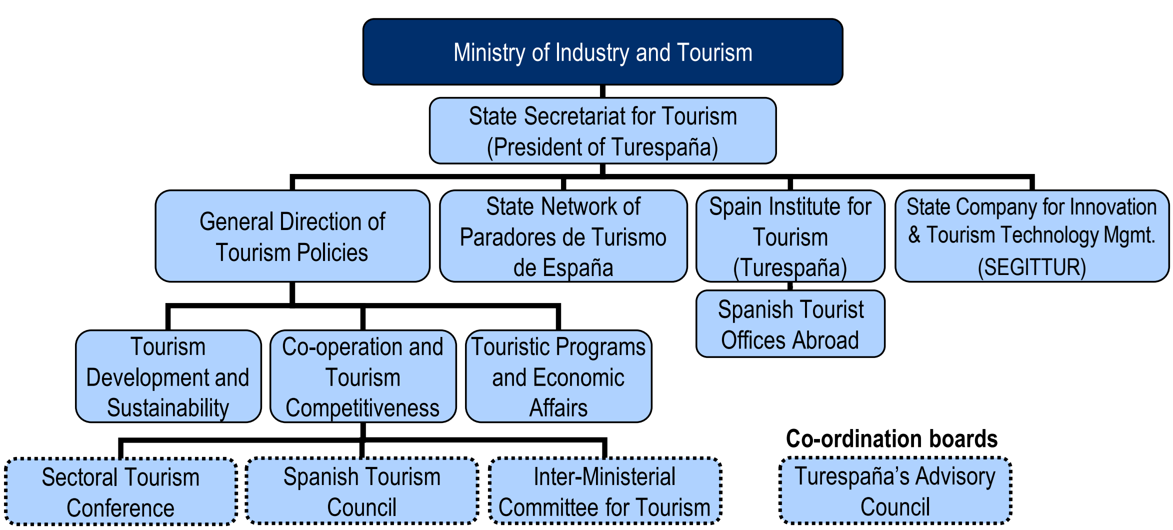
The Ministry of Industry and Tourism is responsible for tourism policy at central government level. The State Secretariat for Tourism, supported by the General Direction of Tourism Policies (*Dirección General de Políticas Turísticas*), leads the design, co-ordination and implementation of national tourism strategies, in close collaboration with regional authorities and international partners. The State Secretariat oversees three key public entities:

- SEGITTUR, which promotes innovation, digital transformation and smart destination development within the tourism ecosystem.
- Turespaña, the national tourism marketing organisation, responsible for international promotion through a network of 33 overseas offices.
- Paradores de Turismo de España, a state-owned hotel company operating 99 establishments, many located in heritage sites and protected areas.

Given Spain's decentralised governance structure, co-ordination mechanisms between the central government, autonomous communities and the private sector play a central role in tourism policy. The Sectoral Tourism Conference (*Conferencia Sectorial de Turismo*) brings together national and regional authorities to ensure policy coherence and regulatory alignment. The Spanish Tourism Council (CONESTUR) provides a platform for consultation with private sector stakeholders. In addition, the Inter-Ministerial Committee for Tourism facilitates horizontal co-ordination across ministries whose policies affect tourism, including transport, environment and labour. The Turespaña Advisory Council, comprising 11 public and private sector representatives, provides guidance on the strategic direction and implementation of Spain's international tourism marketing.

Under the 2023 General State Budget, the Ministry of Industry and Tourism was allocated approximately EUR 277.1 million for co-ordination, promotion and support for tourism policy. In the absence of subsequently approved State Budgets, the 2023 allocations have been extended under the budgetary rollover mechanism and therefore constitute the reference baseline for the 2024–26 period. These figures exclude the extraordinary funding channelled through the Recovery, Transformation and Resilience Plan, which supported substantial tourism-related investments on a temporary basis and is scheduled to conclude in 2026.

Spain: Organisational chart of tourism bodies



Source: OECD, adapted from Ministry of Industry and Tourism, 2026.

Tourism policies and programmes

Tourism policy in Spain is guided by the Spain Tourism 2030 Strategy, adopted in 2025, following a participatory process launched in 2022 within the Spanish Tourism Council (CONESTUR), involving over 200 regional authorities, social partners, academia and industry representatives. The Strategy is aligned with the UN 2030 Agenda, the EU Transition Pathway for Tourism and the Statistical Framework for Measuring the Sustainability of Tourism (co-chaired by Spain at the UN level).

The Strategy includes 50 specific measures, structured around the three pillars of sustainability (economic, social and environmental). It aims to create value through sustainable tourism, rather than a volume-driven approach and is built on two foundational principles:

- People at the centre: tourists, workers, entrepreneurs, residents and destination builders must all benefit because tourism is fundamentally a human activity interconnected with local communities (residents, workers, entrepreneurs).
- Interdependence of economic, social and environmental sustainability: progress requires integrated actions, not parallel siloed agendas. The Strategy is based on a holistic understanding of tourism sustainability, which will enable the development of a truly sustainable tourism policy.

The Strategy defines 15 common goals based around the roles that people play within the tourism sector – destination builders, job creators, workers, residents, tourists – and is structured into five main programmes reflecting these identified roles:

- Destinations Programme: aims to strengthen the management capacities of destinations, renew sun and beach, urban, rural, and nature destinations, improve collaborative governance, advance environmental sustainability (focusing on water usage, mobility, carbon footprint), increase resilience to climate risks and strengthen Spain’s international competitiveness. Key actions include climate adaptation in coastal and island destinations, support for rural and inland areas to promote territorial balance and reduction of seasonality.
- Business Programme: prioritises support for the 93.8% of tourism companies that are SMEs. Key measures include digital transformation through the ‘Última Milla’ (Last Mile) programme for the digitisation of tourism companies (supporting nearly 500 tourism SMEs), integration of SMEs into digital innovation centres and EU digital programmes and support for internationalisation and innovation in tourism products.
- Talent Programme: tourism represents over 13% of national employment and the Strategy identifies workforce sustainability as a structural priority. Key actions include improving working conditions and professionalisation, aligning training with green and digital transitions and promoting risk prevention and crisis resilience. The implementation of the ‘Anfitriones’ national training programme will provide free and flexible learning opportunities for tourism professionals across Spain. Key priorities include sustainability, digitalisation, innovation and service quality.
- Residents Programme: the Strategy explicitly addresses resident perceptions and social sustainability. According to the Resident Opinion Survey on Tourism conducted by Turespaña in 2024, 65% of the resident population aged 18 and over have a positive or very positive opinion of the effects of tourism on their place of residence. Key actions include tackling housing pressure, support for regulation of short-term rentals, protection of cultural heritage and “living culture” and reinforcement of governance mechanisms in destinations.
- Tourists Programme: actions aim to influence demand patterns and visitor behaviour to promote sustainability values, raise visitor awareness of responsible behaviour, increase tourists’ contribution to environmental sustainability, communicate achievements and good practices related to environmental performance, understand visitor adaptability to climate change and introduce new sustainability standards.

The Strategy will be implemented through a two-tier governance structure including the Spain Tourism 2030 Monitoring Committee, which is chaired by the Secretary of State for Tourism and includes the Directorate General for Tourism Policies, Turespaña, Segittur, and Paradores, and the Inter-Ministerial Committee for Tourism. Built-in monitoring and evaluation mechanisms include biennial action plans, annual monitoring reports, interim and final evaluations and both implementation and impact indicators.

Beyond the Strategy, Spain launched the Smart Destinations Platform in June 2025 (see box below). The aim of the platform is to integrate, collate and combine public and private data to build information on the ecosystems of Spanish tourism destinations, while activating continuous innovation and meeting the needs of tourists, destinations and companies.

Launching a destination data management platform in Spain

Spain launched the Smart Destinations Platform to address a structural capacity gap in destination-level data management. Many small- and medium-sized tourism destinations lacked the financial and technical resources to develop interoperable digital infrastructures, limiting evidence-based decision making and effective management of tourism flows and impacts.

Developed by SEGITTUR and funded through the Recovery, Transformation and Resilience Plan, the Smart Destinations Platform provides a shared national digital platform to integrate public and private data through a common model that aligns with Spain's Smart Tourism Destination Standards.

The Platform offers a first layer of content, such as events, points of interest, tourist recommendations or routes curated by the destination, a single common data language and automatic multilingual translation. This solid foundation allows destinations to focus on creating quality content. The Platform supports the entire tourism value chain, from trip preparation to in-destination services and provides destinations with tools for strategic planning, monitoring and control. It also integrates advanced tourism intelligence capabilities, including data generation, descriptive and predictive analytics, and knowledge visualisation, and is aligned with the development of the Spanish Tourism Data Space.

Key challenges for the implementation of the Platform included aligning diverse stakeholders with different levels of digital maturity, the definition of a common system for organising information, ensuring data quality and standardisation, and building trust among public and private actors regarding data sharing. Addressing these issues required strong governance mechanisms, continuous capacity-building efforts and close collaboration with regional and local administrations.

The Platform aims to integrate all Spanish smart tourism destinations, providing a shared digital foundation to reduce individual implementation costs and accelerate digital uptake. Initial results show increased participation of destinations and stakeholders, improved availability of structured tourism data and enhanced analytical capacity at destination level. Technical sandboxes and open innovation services have been deployed to encourage collaboration with start-ups and technology providers.

Spain - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/6xqk3o

Sweden

Sweden: Key tourism messages 2026

Tourism direct GDP (2024)	Tourism direct employment (2024)	Travel exports (2024)
2.8% of total GDP (up 0.2 percentage points since 2023)	2.6% of total employment (up 0.1 percentage points since 2023)	9.3% of total service exports (down 0.1 percentage points since 2023)

National tourism strategy: Not applicable

National tourism administration: Swedish Agency for Economic and Regional Growth

National tourism budget: SEK 133.8 million (2025)

Key tourism policy priorities and actions:

- *Reducing administrative burden for tourism businesses* – Reducing the regulatory burden and associated costs for businesses to promote growth, jobs and higher tax revenues.
- *Improving tourism data* – Utilising data from credit card companies to track and analyse the effects of tourism at the regional and municipal levels.
- *Supporting the tourism workforce* – Creating an alignment between employers and education providers to develop a strategic skills supply for tourism.

Tourism in the economy and outlook

Tourism is an important economic driver for the Swedish economy. In 2024, tourism contributed 2.8% to Sweden's national GDP or SEK 181 billion, an increase of 12.7% compared to 2023. On average, 130 900 people were employed in tourism in 2024, representing 2.6% of total employment and an increase of 2.0% compared to the previous year. Travel exports reached SEK 113.2 billion or 9.3% of total service exports, in line with the share in 2023.

Sweden registered 8.7 million international overnight visitors in commercial accommodation establishments in 2024, staying 16.8 million nights. This is a 15.3% increase in overnight visitors from 2023, while nights increased by 2.0%. The three main source markets in terms of bednights, were Germany (21%), Norway (20%), and Denmark (12%). International arrivals decreased by 2.8% in 2025.

There were 50.1 million domestic nights recorded at commercial accommodation establishments in 2024. This figure was down slightly (2.5%) from 2023 but 0.6% above 2019 levels.

Tourism governance

The Swedish Agency for Economic and Regional Growth, Tillväxtverket, is responsible for tourism at the national level. Visit Sweden is a state-owned company that markets Sweden as a tourist destination internationally. Both organisations report to the Ministry of Climate and Enterprise.

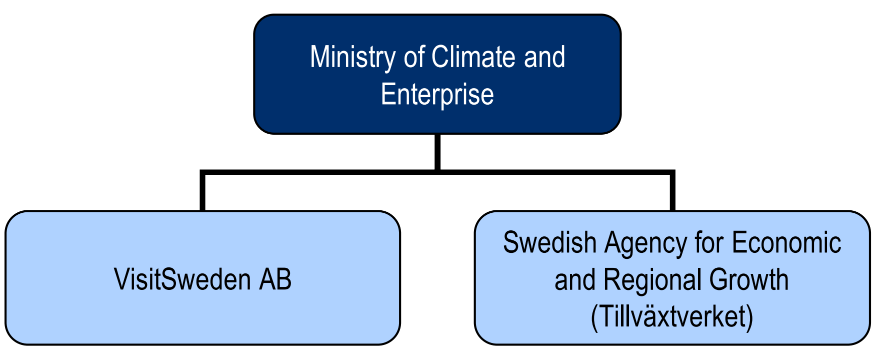
Tillväxtverket develops, implements, and supports knowledge-based initiatives and activities to promote tourism sector development and entrepreneurship. The Agency is also responsible for official tourism statistics, including the production and dissemination of knowledge on tourism and its effects on the Swedish economy. Where necessary, it collaborates with other government agencies on issues related to tourism.

Tourism is prioritised and high on the agenda in many municipalities and regions. A regional tourism network is established, organised and run at the regional level. The network is an important tool for communication and collaboration with industry organisations and national stakeholders. The Swedish Association of Local Authorities and Regions, an umbrella organisation for local and regional authorities, offers support and services through networking platforms, knowledge reports and conferences, among other activities.

The Swedish Institute, a governmental authority, leads a Team Sweden group focused on the Brand Sweden strategy, bringing together a wide range of key actors including the business sector, academia, government agencies, civil society and Visit Sweden. Swedish embassies play a central role in promoting Sweden abroad, working closely with the Swedish Institute as part of this co-ordinated effort.

Visit Sweden was allocated SEK 109.6 million in 2025, while Tillväxtverket allocated SEK 24.2 million within its appropriations framework. for tourism activities. Significant resources have also been allocated to tourism through regional and EU funds.

Sweden: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Climate and Enterprise, 2026.

Tourism policies and programmes

Sweden currently has no specific long-term strategy for tourism. Instead, tourism is considered in Sweden's overarching economic policy goal. However, strategies do exist for specific areas of tourism including:

- Sweden Brand Strategy – The National Brand Strategy, implemented in May 2025, provides direction for promoting Sweden abroad. The Strategy puts an increased focus on co-ordinated communication and long-term positioning of Sweden as innovative, sustainable and free trade friendly.

- Swedish Food Strategy – This Strategy sets a framework to develop a competitive and sustainable food supply chain by 2030. Tourism is incorporated in the form of marketing for food and beverage tourism.

Regions in Sweden have also adopted their own strategies, with 18 regional tourism strategies currently being implemented.

The Nordic Tourism Plan 2025-2030 is a strategic document which is aligned with and supports the overall strategy for Nordic co-operation in the business sector and the objectives of Vision 2030. The Plan aims to strengthen Nordic tourism co-operation and support and facilitate growth in the tourism sector, with activities carried out to complement national tourism strategies and provide Nordic added value. The Nordic Tourism Working Group was formally established in 2019 to oversee implementation of the Nordic Tourism Plan and includes Denmark, Finland, Iceland, Sweden and Norway.

The Swedish Government is focusing on minimising the regulatory burden on small businesses in the tourism sector (as well as in other industries). In recent years, several complex regulatory frameworks have been introduced to improve regulation and compliance that are difficult to apply and, in many cases, are also subject to over-implementation. This has significant consequences for businesses and, ultimately, for Sweden's overall competitiveness.

There is broad political consensus in Sweden that both starting and running a business must become easier to strengthen competitiveness, innovation, and the development of new business models. Sweden is exploring opportunities to reduce the regulatory burden and associated costs for businesses, to increase tourism growth, jobs, and tax revenues. One recent action was removing the need for a hotel permit when starting or taking over a hotel business. The permit has been replaced by an easier application procedure.

The tourism workforce continues to face persistent challenges related to skills supply in Sweden. To better understand these issues, Sweden undertook a study in 2023 on 'Problem mapping - Challenges and opportunities for the hospitality industry's skills supply'. This report reveals that the pressing structural issues facing the sector are not only its limited attractiveness as a long-term career path, but also the mismatch between education and employment opportunities.

Transport remains a key priority for the tourism sector. The national plan for transport infrastructure for the period 2026-2037 enables strong investments in the road system, including investments in electric charging infrastructure, which will facilitate sustainable tourism in cities and remote areas. The Swedish Transport Administration will present a strategy to synchronise the Swedish railway system with the European Rail Traffic Management System. The goal is to introduce the European system in 2042.

Finally, the improvement of tourism data continues to be a priority for Sweden. In 2025, the Swedish Agency for Economic and Regional Growth (Tillväxtverket) presented new tourism accounts at the national, regional, and municipal levels. The calculations were made using a new method linked to Big Data. For the first time, the effects of tourism are being measured at the regional and municipal levels for the years 2019–2023. Sweden has also launched a new platform which allows for the uniform collecting, structuring and distribution of tourism data to create access to reliable information at lower cost and with higher quality (see box below).

A national tourism API for increased competitiveness and innovation in Sweden

Sweden has launched a national collaboration project to establish a standardised API for the tourism sector. The initiative makes it possible to collect, structure and distribute tourism data in a uniform way, ensuring that businesses, regions, and global platforms can access reliable information at lower cost and with higher quality. Today, tourism data is scattered across local systems and websites, which limits visibility and efficiency. The national API provides a digital infrastructure that enables innovation, smarter services and a stronger international reach.

Reliable and accessible data is also essential to support evidence-based policy decisions and long-term sustainable growth in tourism. By providing an open standard for data sharing, the API contributes to greater transparency, improved co-ordination between stakeholders, and ensures that Sweden's tourism offer is visible in the channels where prospective visitors search. The project also addresses the data requirements for AI-driven travel planning, sustainability monitoring and digital innovation in line with Sweden's data and digitalisation strategies.

To build a long-term structure and help companies gain visibility through the API, Sweden's destinations, municipalities and regional tourism organisations are involved in managing different parts of the process. Examples of actors already exporting data, or soon to be connected, include major Swedish hotel chains such as Scandic, Best Western, Strawberry and Elite, as well as Swedish Tourist Association, Göta Kanal, Svensk Camping, Park & Resorts, First Camp and Svenska Möten. The project has the ambition to scale further through European and international partnerships. The goal is that the national API will serve as a fully operational backbone for data-driven tourism development, securing Sweden's position as one of the leading digital destinations in the world.

Sweden - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/qbcljr

Switzerland

Switzerland: Key tourism messages 2026

Tourism direct GVA (2024)	Tourism direct employment (2024)	Travel exports (2024)
2.9% of total GVA (up 0.1 percentage points since 2023)	4.2% of total employment (equal to share in 2023)	12% of total service exports (down 0.6 percentage points since 2023)

National tourism strategy: Tourism Strategy of the Swiss Confederation

National tourism administration: State Secretariat for Economic Affairs

National tourism budget: CHF 56 million (Switzerland Tourism); CHF 10.5 million (Innotour)

Key tourism policy priorities and actions:

- *Improving framework conditions for tourism* – Creating a tourism-friendly regulatory environment and improving co-ordination among stakeholders.
- *Promoting tourism entrepreneurship* – Supporting structural change, strategic capacity-building and better use of the tourism labour market.
- *Advancing sustainable tourism development* – Positioning Switzerland as a global leader in sustainable tourism through the "Swisstainable" initiative while supporting climate adaptation and biodiversity conservation.

Tourism in the economy and outlook

Tourism is an important contributor to the Swiss economy, directly accounting for 2.9% of GVA and employing or 4.2% of the total workforce, or 187 770 people (full-time equivalents) in 2024, an increase of 1.2% compared to 2023. Travel exports represented 12.0% of total service exports, a decrease from 12.6% in 2023.

International tourism has reached record levels in Switzerland. International tourist arrivals at commercial accommodation establishments rose to 12.3 million in 2024, an increase of 6.0% compared to 2023. Switzerland's top three source markets in 2024 were Germany (19%), United States (14%) and France (8%). It is estimated that international arrivals to Switzerland decreased by 5.0% in 2025.

Domestic demand remained relatively flat in 2024, with 14.3 million domestic visitors staying more than 32 million nights in tourist accommodation establishments.

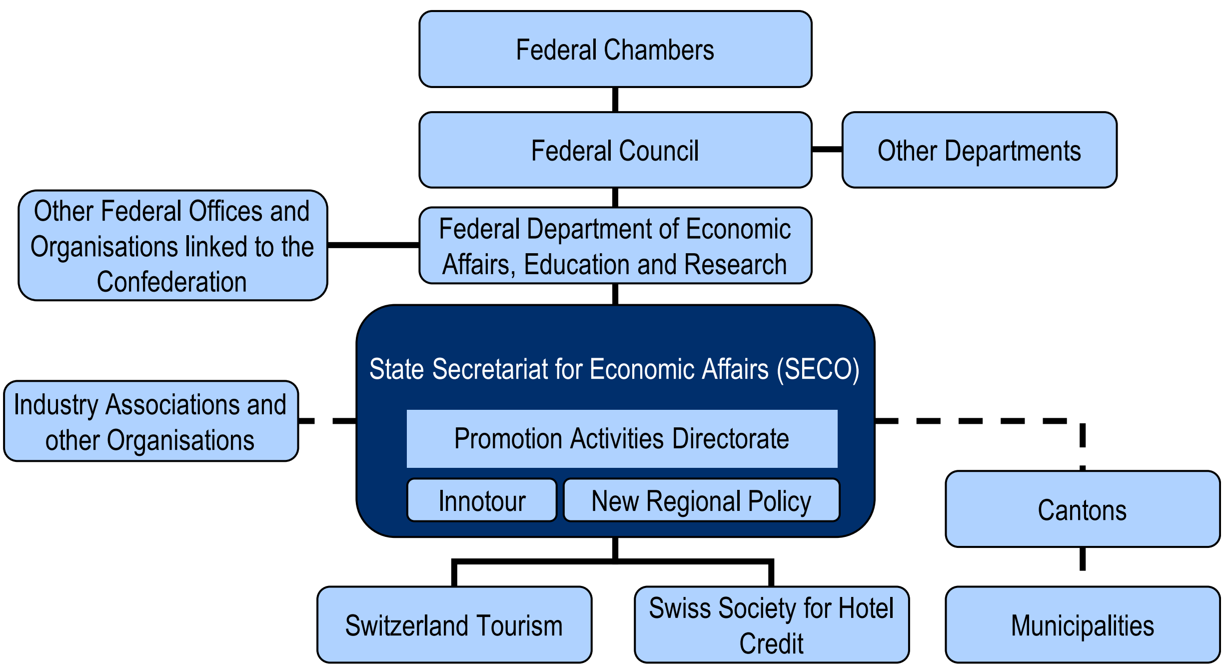
Tourism governance

The State Secretariat for Economic Affairs (SECO), in collaboration with numerous national and regional level political bodies, is responsible for developing and implementing Switzerland's tourism policy. SECO enforces the Federal Act on the Promotion of Innovation, Co-operation and Knowledge Building in Tourism (Innotour) and supervises two organisations commissioned to implement tourism-related measures: Switzerland Tourism is the country's official marketing organisation, and the Swiss Society for Hotel Credit supports investment in the accommodation sector.

For the years 2024-27, the overall federal contribution to Switzerland Tourism will be no more than CHF 233 million. Over the same period, CHF 45 million in regular Innotour funds are available to promote innovation and co-operation in tourism, of which CHF 15 million are allocated to a COVID-19 recovery programme running until the end of 2026. The promotional activities of the Swiss Society for Hotel Credit are based on a federal loan of CHF 236 million. The New Regional Policy framework provides around CHF 200 million in loans for investment and CHF 200 million for contributions (subsidies) to projects with regional economic impact.

A programme to relieve the Federal budget provides for a 10% reduction in funding for Switzerland Tourism as well as for Innotour from 2027.

Switzerland: Organisational chart of tourism bodies



Source: OECD, adapted from the State Secretariat for Economic Affairs, 2026.

Tourism policies and programmes

The Tourism Strategy of the Swiss Confederation represents the Government's long-term vision for tourism in Switzerland. The main objectives of the Strategy are to improve the framework conditions for tourism, promote entrepreneurship, support sustainable development, take advantage of opportunities offered by digitalisation, and enhance the attractiveness of tourism products and Switzerland's market presence. The next report on the implementation and the strategic orientation of the Swiss Confederation's tourism policy will be published in 2027.

Improving the framework conditions and reducing the regulatory burden is key for the continued success of tourism businesses. To reduce administrative tasks, Switzerland will introduce a digital guest registration system for the accommodation sector via EasyGov. This will modernise the check-in process, eliminate paper forms, and reduce administrative workload for businesses (see box below).

The shortage of personnel and skilled workers is one of the major challenges facing Swiss tourism, which can also make it difficult to encourage tourism entrepreneurship. Irregular working hours, seasonal fluctuations, limited housing, demographic shifts and competition from other sectors reduce the attractiveness of tourism careers. To address this, Switzerland supports two key industry projects: “Avanti!” by GastroSuisse and “Future in Tourism” by the Swiss Tourism Managers Association. Both initiatives aim to improve the sector’s image, attract new talent and support entry into the tourism workforce. Looking ahead, targeted support through the New Regional Policy is being considered with the aim to integrate tourism-specific concerns into broader education and labour market discussions.

Climate change poses a major challenge for tourism, affecting destinations through reduced snow reliability and extreme weather events. At the same time, tourism contributes to climate change, especially through emissions from travel. Guests increasingly expect environmentally friendly offers, prompting tourism businesses to adapt infrastructure, mobility and services. The “Kompass Schnee” helps winter destinations plan climate adaptation strategies using scientific data and a digital tool. The project is based on climate forecasts for various winter sports regions. The identified trends and observations are condensed into an instrument that allows decision makers to define and implement optimal climate adaptation strategies. The Adapt+ whole of government funding programme, introduced in 2025, will support climate adaptation in tourism, with a focus on diversifying offerings and strengthening year-round tourism.

Tourism acceptance is increasingly challenged by overcrowding, noise, and environmental impacts, especially in high-traffic areas. Switzerland Tourism and the Regional Tourism Alliance have launched co-ordinated measures to promote tourism as part of the local living environment. This includes; sensitising guests to local customs, developing a toolbox for tourism actors to manage large visitor numbers, and conducting nationwide surveys in 2024 and 2025 to assess public attitudes. Looking ahead, Switzerland Tourism will consider demand management options to better distribute visitor flows and promote year-round tourism. Regular surveys will help monitor public acceptance and develop mechanisms to better manage tourism flows.

Digitalisation remains a key strategic priority for Swiss tourism, although it remains hindered by fragmented structures and a lack of unified data standards. Despite progress, co-ordination among tourism actors is still limited. The “AI Local Guides” programme brings together major destinations like Basel, Graubünden, Lucerne, and Zurich to develop interactive digital tour guides using AI. The AI-powered guides respond flexibly to the needs of individual travellers and provide personalised experiences in real-time, combining local knowledge, historical anecdotes and current data. The digital guides can be made available via the Joaia app, integrated into their own applications via an API, or as a web plugin directly on websites. This flexibility allows destinations of all sizes to create and offer digital travel companions without great financial outlay. Tourism organisations also benefit from valuable analyses of visitor interaction.

Digitalising accommodation registrations in Switzerland

The Swiss Federal Government plans to digitalise the guest registration process across the country's accommodation sector. This initiative responds to Motion 21.4426, which calls for a national digital solution to replace the current paper-based system and reduce administrative burdens for tourism businesses. By digitalising the registration process, the Federal Government seeks to modernise administrative procedures, improve efficiency, and support the tourism sector's competitiveness.

Currently, guest registration is managed by the cantons, resulting in highly fragmented and inconsistent procedures. Some cantons require registration of both foreign and domestic guests, and many actors are involved in the process. Several methods for guest data transmission were evaluated, with a study recommending an email-based solution. However, the Federal Government intends to go further by integrating a dedicated digital process into the EasyGov platform. This new "guest registration" module will allow accommodation providers to submit guest data directly to cantonal authorities, streamlining the process and reducing administrative effort. This will also require a revision of the Ordinance on Admission, Stay and Employment, as it mandates handwritten signatures from guests and removing or replacing this requirement is essential to enable digital registration.

The revision of the Ordinance is scheduled for public consultation in 2026, and the EasyGov module is expected to be implemented by 2028. Cantons with existing digital systems may continue using their current solutions. The new approach aims to support cantons without digital infrastructure and ensure nationwide consistency.

Switzerland - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/6zu4xt

Türkiye

Türkiye: Key tourism messages 2026

Tourism direct GVA (2024)	Tourism direct employment (2024)	Travel exports (2024)
5.1% of total GVA (down 0.2 percentage point since 2023)	3.7% of total employment (up 0.3 percentage points since 2023)	49% of total service exports (up 2.2 percentage points since 2023)

National tourism strategy: Türkiye Tourism Master Plan 2024–2028

Responsible government agency: Ministry of Culture and Tourism

National tourism budget: N/A

Key tourism policy priorities and actions:

- *Monitoring tourism's carbon footprint* – Developing a free carbon footprint calculator module which is accessible to accommodation managers and links to sustainable tourism certification schemes.
- *Certifying sustainable tourism* – Setting criteria for a progressive, three stage certification system and mandating compliance for accommodation businesses through the Türkiye Environmental and Cultural Sustainability Program.
- *Increasing tourism revenues* – Working to increase the number of tourists in Türkiye and the share of world tourism revenues, with a goal to reach USD 100 billion in tourism revenue by 2028.

Tourism in the economy and outlook

Tourism is a key contributor to Türkiye's economy. In 2024, tourism directly accounted for 5.1% of the national GVA. Tourism-related employment accounted for 3.7% of total employment in 2024, up from 3.4% in 2023, while travel exports represented 49% of total service exports.

Tourism revenues reached a record USD 65.2 billion in 2025, increasing from USD 61.1 billion in 2024. In 2026, tourism revenues are estimated to reach around USD 68 billion, representing growth of approximately 4.3% over the previous year. Türkiye aims to achieve USD 100 billion in tourism revenue by the end of 2028. There were 64 million international visitors in 2025, an increase of 2.7% compared to 2024. The top three source markets were the Russian Federation (10.8%), Germany (10.6%), and the United Kingdom (6.5%).

Domestic tourism continues to recover from the significant impacts of the COVID-19 pandemic. In 2024, Türkiye recorded 66.8 million domestic tourists, an 8.7% increase compared to 2023, but still 14.5% below the pre-pandemic high of 78.2 million domestic overnight trips.

Tourism governance

In Türkiye, the Ministry of Culture and Tourism is responsible for tourism policy. Its duties are to investigate, develop, protect, maintain, evaluate, disseminate and promote tourism as determined by the Presidential Organisation Law No: 1 (2018).

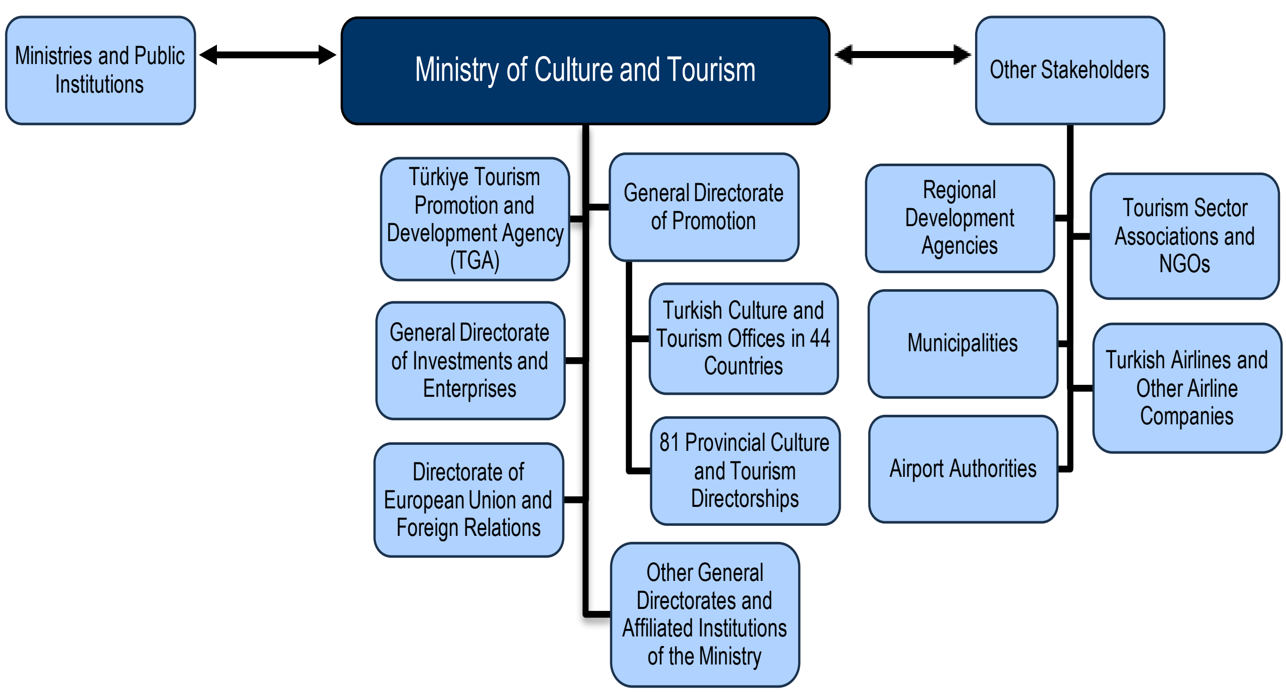
One of main units of the Ministry of Culture and Tourism, whose duties and responsibilities are determined in the Presidential Organisation Law No: 1 (2018) is the General Directorate of Promotion. The main duties of the General Directorate of Promotion are to promote Türkiye's historical, touristic, cultural and natural values of Türkiye both within the country and abroad by using all possible means, to increase the market share and the number of visitors coming to Türkiye.

The Türkiye Tourism Promotion and Development Agency is responsible for developing strategies and promoting Türkiye as a brand and a popular destination to both domestic and international tourism markets; discovering, developing and promoting natural, cultural and heritage assets; boosting the tourism capacity of Türkiye by increasing tourism investments in the national economy and raising the quality of service through communication and marketing activities. Operating under the auspices of the Ministry of Culture and Tourism, the Agency is subject to private law provisions.

The Ministry works closely with the Association of Turkish Travel Agencies, Touristic Hotels and Investors Association, Hoteliers Federation, Turkish Tourism Investors Association and the Union of Tourist Guides' Chambers to plan tourism and address specific issues. The Investment Office of the Presidency of the Republic of Türkiye also promotes Türkiye's investment opportunities to the global business community and assists investors.

Türkiye has 81 Provincial Culture and Tourism offices that work to conserve historical, cultural and natural heritage, diversify tourism, and promote their regions through cultural events, festivals and fairs.

Türkiye: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Culture and Tourism, 2026.

Tourism policies and programmes

The Türkiye Tourism Master Plan 2024-2028 provides a comprehensive roadmap to achieve sustainable and inclusive tourism growth in Türkiye for both public and private sector actors. The Plan aims to enhance Türkiye's competitiveness in the global tourism market, increase tourism revenues, support long-term development by balancing the environmental and socio-cultural impacts of tourism, and provide inclusive guidance for all stakeholders. The Plan is aligned with Türkiye's 12th Development Plan. The Tourism Master Plan is also supported by individual tourism master plans in many provinces, which focus on the unique tourism products of each province and are typically commissioned by local authorities. While the themes are shaped according to local tourism potential, these plans are designed in alignment with the overarching framework of the Türkiye Tourism Master Plan.

The Türkiye Environmental and Cultural Sustainability Program, launched in 2022, has now been implemented across all 81 provinces of Türkiye, establishing a strong and inclusive national structure for sustainable tourism practices. The verification or certification is granted to accommodation facilities that meet international standards in terms of economic, environmental and social sustainability. One of the main challenges was to develop a practical and internationally aligned set of criteria that could be applied across all 81 provinces, each with distinct economic, cultural, and geographical characteristics. To address this, a three-stage consultation process was conducted with the participation of sector representatives and relevant stakeholders, with the criteria categorised from the easiest to implement to the most complex and investment-intensive.

This staged-based system enabled the creation of an inclusive business model that applies to all accommodation facilities, regardless of size or capacity. Facilities with adequate infrastructure can meet all 42 criteria aligned with Global Sustainable Tourism Council standards and earn the "3rd Stage Sustainable Tourism Certificate", while those meeting 14 criteria receive the "1st Stage Verification," and those meeting 29 criteria receive the "2nd Stage Verification." Each stage is structured to support gradual compliance and facilitate sector-wide adaptation. In efforts to continually improve sustainability practices, Türkiye has required all accommodation facilities to obtain at least a 2nd Stage Verification by 31 December 2025. The aim is to gradually extend this requirement to a 3rd Stage Certification for all facilities within a five-year period.

As of 18 May 2026, a total of 18 809 active facilities had obtained verification or certification under the programme. This includes 381 facilities with 1st Stage Verification, 16 054 facilities with 2nd Stage Verification and 2 374 facilities holding the 3rd Stage GSTC Certification.

Measuring and monitoring the carbon footprint of tourism businesses, a requirement under the Environmental and Cultural Sustainability Program, has been a key challenge for tourism businesses in Türkiye (see box below). To address this issue and enhance industry participation, the Türkiye developed a free carbon footprint calculator module accessible by authorised facility managers. Through this module, registered businesses can measure and monitor their carbon footprint at no cost and use the data to improve their operational processes in line with sustainability criteria. The calculator has been designed to accommodate the diverse characteristics of accommodation facilities by considering factors such as total floor area, number of rooms, meeting spaces, climate-controlled areas, occupancy rates, and staff zones. It also allows the input of various energy sources, including electricity, natural gas, liquid and solid fuels, and renewable energy generation or consumption.

Carbon footprint measurement model under the Türkiye Environmental and Cultural Sustainability Program

Under the Türkiye Environmental and Cultural Sustainability Program, a comprehensive system has been established to support accommodation facilities in meeting key sustainability performance indicators. Recognising that carbon footprint measurement is a fundamental part of sustainability monitoring, Türkiye has developed a free Carbon Footprint Calculator Module accessible to all authorised accommodation facilities.

This digital tool was designed to make data collection and reporting easier, enabling businesses to measure and monitor their carbon emissions accurately and consistently. It considers the physical characteristics of each facility, including total floor area, number of rooms, meeting spaces, climate-controlled areas, occupancy rates, and staff zones, as well as energy inputs such as electricity, natural gas, liquid and solid fuels, and renewable energy generation or consumption.

The calculator automatically converts these data into standardised carbon emission values, providing both total and per-guest emission metrics. Facilities can use this information to track performance over time, identify high-consumption areas, and implement targeted emission reduction strategies.

The results generated by the module are integrated into the Türkiye Environmental and Cultural Sustainability Program's verification and certification framework, allowing facilities to demonstrate compliance with sustainability criteria more efficiently. Ultimately, this tool enhances the overall monitoring, transparency, and accountability of the tourism sector, supporting Türkiye's national goal of achieving full alignment with international sustainability standards by 2030.

Türkiye - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/a1hxz4

United Kingdom

United Kingdom: Key tourism messages 2026

Tourism direct GVA (2024)	Tourism direct employment (2024)	Travel exports (2024)
2.6% of total GVA (up 0.2 percentage points since 2023)	3.5% of total employment (up 0.2 percentage points since 2023)	13% of total service exports (up 0.5 percentage points since 2023)

National tourism strategy: Visitor Economy Growth Strategy (under development)

National tourism administration: Department for Culture, Media and Sport

National tourism budget: GBP 52.7 million (2024-25)

Key tourism policy priorities and actions:

- *Supporting the recovery and growth of inbound tourism* – Ensuring a sustainable recovery of visitor number and spend while maximising regional distribution through the forthcoming Visitor Economy Growth Strategy.
- *Enabling transport connectivity* – Working in partnership with the border industry and users of the border to design, deliver and innovate around the border in line with the 2025 UK Border Strategy.
- *Developing the tourism workforce* – Aligning vocational training, apprenticeships and sector-led workforce standards to address shortages through the Hospitality Sector-based Work Academy Programme.

Tourism in the economy and outlook

Tourism is a driver of economic growth for the United Kingdom. The number of businesses in tourism-related industries fell by 195 to 253 383 in March 2023, compared to March 2022. In 2024, the sector contributed GBP 64.3 billion in nominal terms to the United Kingdom economy, accounting for 2.6% of GVA. Travel exports accounted for 13.0% of total service exports in 2024.

The United Kingdom recorded 39.0 million international arrivals in 2024, an increase of 2.8% compared to 2023. International tourist spending was estimated at GBP 36.2 billion. The top three source markets for overnight visitors in 2024 were the United States (14.6%), France (9.4%) and Germany (8.7%). With regards to domestic tourism, the United Kingdom recorded 105.6 million domestic overnight tourists, 10.1% below 2023 levels.

VisitBritain projects continued growth in visits and nominal spend in 2026, though wider economic conditions, exchange rates and global competition may temper momentum. Their current forecast is 45.6 million inbound visits in 2026, with these visitors spending GBP 35.7 billion.

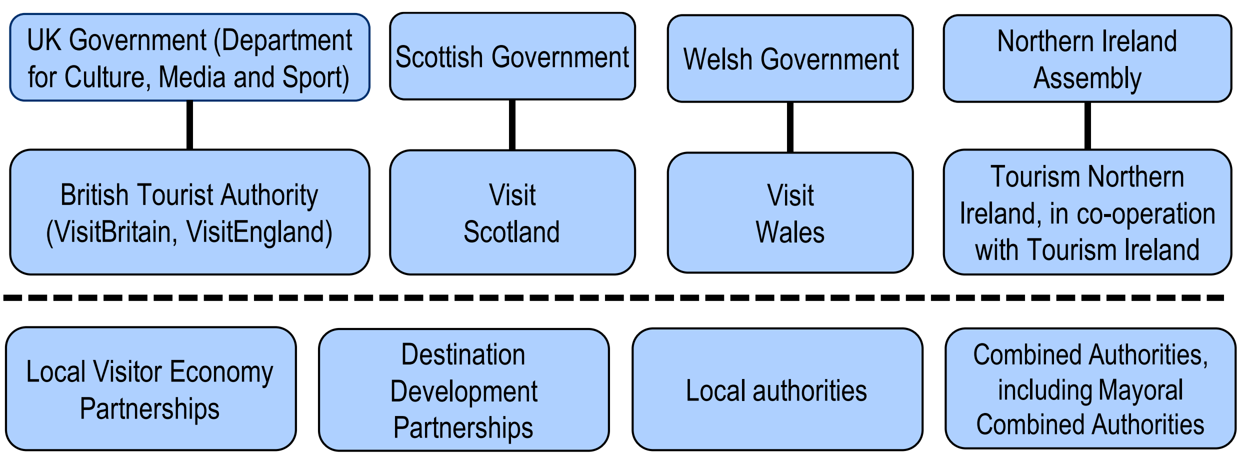
Tourism governance

The Department for Culture, Media and Sport is responsible for tourism policy development in the United Kingdom. The Visitor Economy Advisory Council is a joint industry and government-led board composed of employers, small businesses and representative organisations from across the visitor economy. The Council acts as a sounding board and point of dialogue between ministers and industry. It brings together voices from across the sector and UK Government to drive growth, by identifying and acting on opportunities and removing or reducing barriers, to help deliver a joint long-term national plan for tourism in 2026.

DMOs have been renamed as Local Visitor Economy Partnerships (LVEPs), as part of the recommendations the government is taking forward from an independent review of DMOs released in 2021. These LVEPs are providing local governance leadership in tourism destinations across the United Kingdom – collaboratively working with local, regional and national stakeholders on shared priorities and targets.

The budget allocated to tourism through the British Tourist Authority in 2024-25 was GBP 52.7 million.

United Kingdom: Organisational chart of tourism bodies



Source: OECD, adapted from the Department for Culture, Media and Sport, 2026.

Tourism policies and programmes

The United Kingdom is currently developing a Visitor Economy Growth Strategy, due to be published in 2026. The Strategy is being developed through a co-creation process with the newly established Visitor Economy Advisory Council and aims to attract 50 million international visitors per year by 2030 while sharing the benefits of tourism across every nation and region. This will be complemented by improving tourism management in destinations through the LVEP Programme (see box below). Tourism development is also supported through the whole of government “Net Zero Strategy: Build Back Greener” which sets out policies for decarbonising all sectors of the economy to meet the United Kingdom’s net zero target by 2050 and the National AI Strategy.

Increasing international visitor numbers requires better international connectivity, enabled by better border efficiency. The 2025 UK Border Strategy sets out our vision for the UK border to be the most effective in the world. This is to be delivered through a number of programmes including the development of a Single Trade Window, to create a single gateway for all data from traders into government, and implementation of an Electronic Travel Authorisation to speed passenger journeys through ports. The UK is making steady progress in improvements to deliver a more streamlined, digital immigration system which will be quicker and more secure for the millions of people who pass through the UK border each year; and a major review of the agencies and checks that occur at the border, to rationalise these wherever possible.

Supporting destination management through local partnerships in the United Kingdom

The United Kingdom has created a portfolio of nationally supported and strategic Local Visitor Economy Partnerships (LVEPs) which aim to transform the destination management landscape, supporting and growing local visitor economies. These Partnerships deliver tourism destination management aligned with regional growth priorities. The five key goals of the LVEP Programme include:

- Strategy - Develop a strong national strategic relationship between LVEPs, VisitEngland, the Department for Culture, Media and Sport and wider government.
- Stability - Ensure stability and resilience through increased income generation, diversifying funding streams, and implementing robust destination management and diverse governance.
- Growth - Align local visitor economy growth priorities and activities with those at national level, setting clear targets and driving high performance. A strong emphasis on sustainability and accessibility, growing business support and working on approaches to data will be maintained.
- Place-shaping - Provide a significant role in place shaping and economic development, generating better outcomes for visitors, the environment, communities and businesses, through building influential relationships with local government and businesses.
- Training - Develop skills and expertise in LVEP teams through access to training opportunities, and in the wider sector and SMEs through a more targeted business support offer.

The Programme has facilitated close and positive relationships between LVEPs and their Combined Authorities, and highlighted the importance of the visitor economy for Local Growth Plans. In many regions, Mayors play an integral role in supporting their LVEP.

Tourism workforce and skills development is a core priority for the United Kingdom. Work is being undertaken across government departments to influence education reform, promote tourism sector apprenticeships, including new, more flexible routes, and support employment pathways into the visitor economy, particularly for those with fewer qualifications. The Hospitality Sector-based Work Academy Programme combines a unique course of learning, launched in collaboration with UKHospitality. The programme is designed to provide tailored training for jobseekers from tourism sector experts, allowing them to move into a career in hospitality, while boosting workforce participation in the sector and helping to grow the economy. Benefit claimants can complete qualifications and accredited training in areas such as health and safety, food safety, licensing, and conflict resolution to add to their Hospitality Skills Passport – a digital pass which can be added to CVs to show employers that jobseekers have the skillset required by the sector. They can also receive training in confidence and assertiveness to build personal skills and strength. The programme culminates with a guaranteed job interview for all participants, providing jobseekers a valuable progression opportunity to apply their new skills and a pathway to apprenticeships.

Opportunities to create more granular data are being explored to improve evidence-based decision making at the local and business level. VisitEngland is working closely with LVEPs on a joint data and research programme, providing deeper insights at the local authority and LVEP level. This initiative has led to data sources being available at a more granular level, including the Great British Tourism Survey, International Passenger Survey, short-term rental data, and bank card spending data, which has reduced the need for LVEPs to commission independent research. It has also led to the development of a standardised approach to visitor research which will facilitate benchmarking and a more cohesive national picture. The research reports are available through a Power BI system, allowing LVEPs to build bespoke dashboards and combine data sources to uncover new insights.

United Kingdom - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/gscmt5

United States

United States: Key tourism messages 2026

Tourism direct GVA (2023)	Tourism direct employment (2023)	Travel exports (2025)
3.0% of total GVA (unchanged from 2022)	4.0% of total employment (up 0.3 percentage points from 2022)	20.3% of total service exports (down 1.5 percentage points since 2024)

National tourism strategy: U.S. National Travel and Tourism Strategy

Responsible government agency: National Travel and Tourism Office, U.S. Department of Commerce

National tourism administration: USD 7 million (excluding promotion) (2025)

Key tourism policy priorities and actions:

- *Leveraging large-scale events for tourism growth* – Assessing the economic impact of large-scale events like the FIFA World Cup and the Olympic and Paralympic Games and their ability to benefit communities and businesses across the country from increased tourism spending.
- *Measuring the economic impact of travel and tourism* – Releasing new data products and modernising existing products to better showcase the economic impact of travel and tourism.
- *Reducing barriers to trade in travel services* – Ensuring a safer and more efficient travel experience to and within the United States while leveraging technological advancements to ensure accessible travel for all.

Tourism in the economy and outlook

The travel and tourism sector is an important driver of economic growth and employment in the United States. In 2023, the sector generated USD 840 billion in GVA and directly employed 6.5 million people, accounting for 4.0% of the total workforce. This exceeded the previous peak in 2019, with high of 6.4 million jobs. Travel exports in 2025 accounted for USD 250 billion, representing 20.3% of total service exports.

In 2025, the United States recorded 68.3 million international tourist arrivals, down 5.5% from 2024, and still at 86% of 2019 levels. The top five source markets were Mexico (26%), Canada (24%), United Kingdom (6%), India and Japan (each at 3%).

Domestic tourism is key to tourism in the United States. Domestic travellers took an estimated 2.4 billion person-trips in 2025, up 1.9% compared to 2024.

Tourism governance

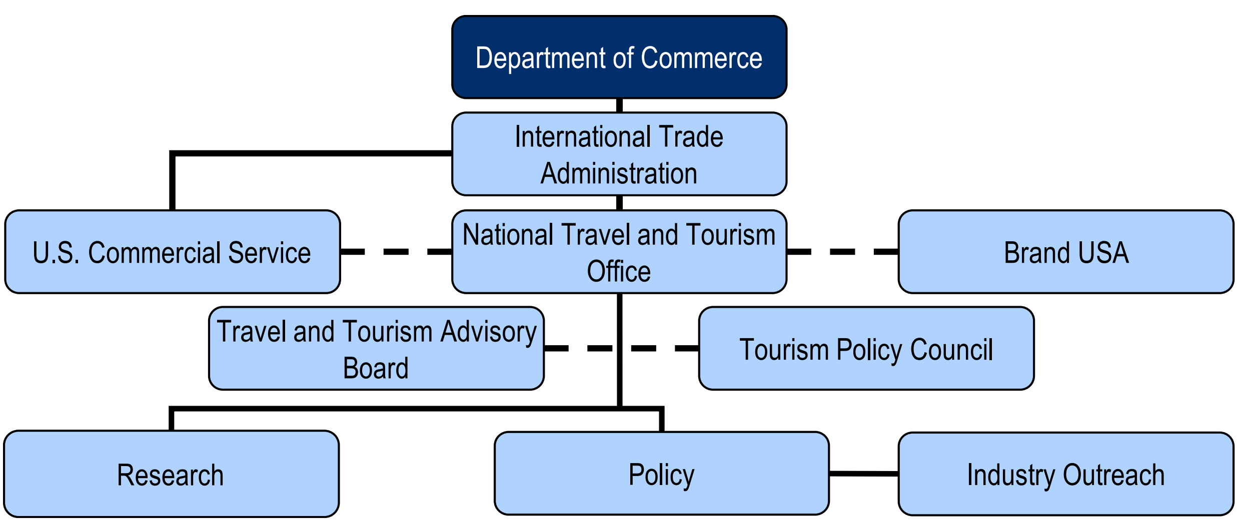
Travel and tourism in the United States is highly decentralised. Public authorities manage tourism at the national, state, regional and local levels. These include the Federal Government, state governments, and destination marketing organisations.

The U.S. Travel and Tourism Advisory Board consists of up to 32 private-sector tourism representatives from businesses and organisations appointed by the Secretary of Commerce to provide policy input on key sector issues. The Tourism Policy Council is an inter-agency council established by law to ensure the nation's travel and tourism interests are considered in federal decision making, co-ordinating national policies and programmes that have a significant effect on international travel and tourism and outdoor recreation. The Tourism Policy Council reviews and considers the Advisory Board recommendations and provides additional insight from the public sector perspective on issues affecting travel and tourism nationally.

The National Travel and Tourism Office (NTTO), within the Department of Commerce's International Trade Administration, serves as the central point of contact within the federal government. NTTO is the source of official tourism statistics to inform public policy and private sector decision making. NTTO is also the official government liaison to the Corporation for Travel Promotion, operating as Brand USA, a non-profit corporation that promotes travel to the United States. Brand USA's Board of Directors is appointed by the Secretary of Commerce.

NTTO is allocated resources from a congressional appropriation to the Department of Commerce and sells research reports and data to generate additional operating revenues. NTTO's operational budget for 2025 was approximately USD 7 million. NTTO also certifies matching funds of up to USD 20 million from the Travel Promotion Fund for use by Brand USA, which is supported by a portion of the fees charged for the Electronic System for Travel Authorisation, paid by international travellers coming from countries participating in the visa waiver programme.

United States: Organisational chart of tourism bodies



Source: OECD, adapted from the United States Department of Commerce, 2026.

Tourism policies and programmes

The National Travel and Tourism Strategy is the primary framework guiding tourism development in the United States. The Strategy outlines a co-ordinated public-private approach to strengthen the competitiveness of the U.S. travel and tourism sector and to advance economic growth across the United States. The implementation of the Strategy is led by the National Travel and Tourism Office through the Tourism Policy Council.

A key priority of the Strategy is to facilitate travel to and within the United States to support a stronger, safer, and more prosperous country, and to increase efficiency for visitors to enter and travel within the country. By leveraging advanced technologies and mobile applications, the United States is working to transform inspections at airports into a seamless, touchless process, enabling faster risk identification and efficient processing of legitimate visitors. Customs and Border Protection continues to roll out airport modernisation enhancements to support the expected increase in international travel for upcoming major events like the FIFA World Cup and Los Angeles Olympics and Paralympics. Enhanced technology ensures better allocation of resources, allowing officers to focus on higher-risk travellers, which aligns with Customs and Border Protection's national security mission.

Upcoming large scale international events provide an opportunity to promote the United States as a travel destination and disperse travellers across the country (see box below). Assessing the economic impact of the games will help destinations understand the cost-benefit ratio of hosting the FIFA World Cup and other major sporting events, and support destinations to plan for future international events. A new framework set up by the Administration, the White House Task Force on the FIFA World Cup 2026, is dedicated to leading and co-ordinating Federal efforts in support of the World Cup. In collaboration with executive departments and agencies, the Task Force facilitates comprehensive planning, organisation, and execution of the event through interagency co-operation, information sharing, and strategic support.

Utilising major events to disperse tourism in the United States

The FIFA World Cup 2026 is hosted by the United States, Canada, and Mexico, with a majority of the matches hosted in the United States' 11 host cities. FIFA estimates that the event could generate up to USD 6.4 billion in tourism spending across the United States. It is expected to significantly boost local businesses, infrastructure development, and job creation across the country.

The U.S. Government, in co-ordination with Brand USA, is working to leverage its hosting of the FIFA World Cup to position itself in 2026 as the premier destination for global sporting events and to encourage visitation to the host cities and beyond. Visitors are expected to attend games, base camp locations and fan events across the country – increasing the overall economic impact. Existing country-specific travel competitiveness data can be utilised to recommend targeted marketing strategies to host cities and destination marketing organisations with the goal of increasing average attendance and travel revenue during the duration of the FIFA World Cup.

The United States aims to measure the economic impact of the FIFA World Cup 2026 – specifically from international visitors but also from all travellers – leveraging existing data sources like the Survey of International Air Travelers to measure international visitation, economic impact, and traveller characteristics. This information can help destinations quantify the cost-benefit ratio of hosting the FIFA World Cup and other major sporting events and support destinations in planning for future international events.

The United States is committed to measuring the economic impact of travel and tourism by releasing new data products and modernising existing products to better showcase the economic impact of travel and tourism. Beginning in 2026, the United States will release new state economic impact reports highlighting the contribution of travel and tourism to GDP and jobs in states across the country. The United States will also modernise the Survey of International Air Travelers by exploring opportunities for digital survey collection in place of traditional paper surveys.

United States - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/phulvs

Part II Partner country profiles

Argentina

Argentina: Key tourism messages 2026

Tourism direct GDP (2022)	Tourism direct employment (2022)	Travel exports (2024)
1.7% of total GDP (up 0.8 percentage points since 2021)	5.5% of total employment (up 0.5 percentage points since 2021)	28.9% of total service exports (down 4.3 percentage points since 2023)

National tourism strategy: National Tourism Policy

Responsible government agency: Secretariat of Tourism and Environment

National tourism budget: ARS 41.1 billion (2025)

Key tourism policy priorities and actions:

- *Promoting and attracting tourism investment* – Driving investment through the Tourism Doing Business: Investing in Argentina guide, the Private Tourism Investment Promotion Programme and the development of Tourism Investment Forums, to position tourism as a strategic activity.
- *Co-ordinating tourism promotion and incentives* – Working with destinations and the private sector to better promote tourism in Argentina through the International Tourism Promotion Plan, the Elegí Argentina promotional platform and support of the open skies policy implementation.
- *Strengthening and diversifying the tourism offer* – Improving efficiency systems, providing guidance to support tourism destinations, establishing guidelines for the preparation of statistical information and promoting the adoption of technological innovation within the sector.

Tourism in the economy and outlook

Tourism continues to play a key role in the Argentine economy, standing out as a generator of foreign currency and exports. In 2024, travel and tourism accounted for 28.9% of services exports, confirming its importance as a source of external income.

Argentina received 5.7 million international tourists in 2025, compared to 6.6 million international tourists in 2024. The top international markets in 2024 for Argentina were Brazil (23%), Chile and Uruguay (15% each). Tourism generated almost USD 5.0 billion in revenues in 2024, a 9.6% decline compared to 2023 figures, which can be attributed in part to the appreciation of the Argentinian Peso.

Domestic tourists remain important to the tourism sector, with 14.1 million domestic overnight visitors staying in commercial accommodation in 2024.

Tourism governance

The Secretariat of Tourism and Environment, operating under the Office of the Chief of Cabinet of Ministers, is the national tourism authority in Argentina. The Secretariat is the implementing authority of the National Tourism Law, and is responsible for the formulation, co-ordination and implementation of national tourism policies, and co-ordination with provincial and municipal agencies. It provides support to the sector in areas such as competitiveness, sustainability and tourism safety, establishing guidelines for the preparation of statistical information, encouraging investment and financing for tourism development and the promotion of domestic tourism. Co-ordinated efforts are often carried out with other government areas and ministries, including Foreign Affairs and Transport and Security. The National Institute of Tourism Promotion (INPROTUR) is responsible for the international promotion of Argentina.

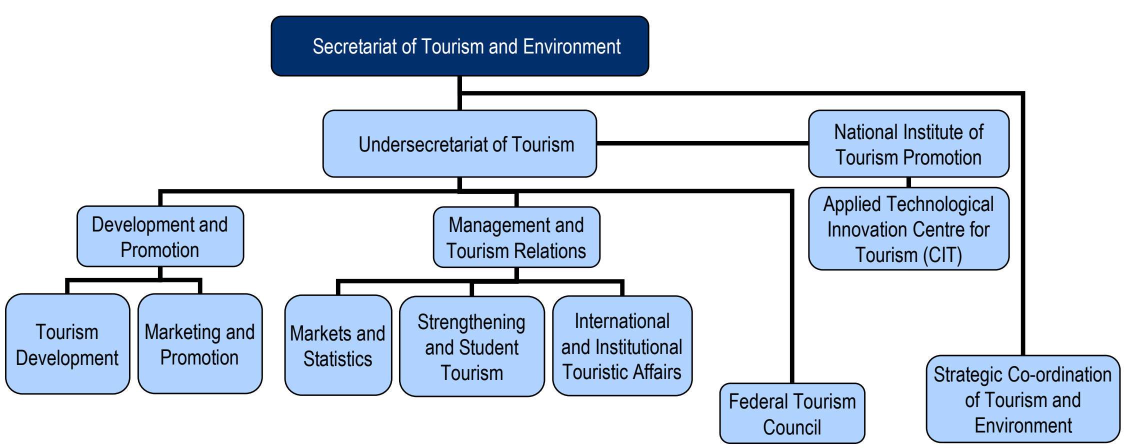
Each Argentine province has its own tourism authority with exclusive responsibility to plan, promote and regulate tourism activities and to define their own tourism development strategies. Municipalities are key actors for operative management and implementation of tourism, especially in destinations with many visitors.

There are also mechanisms for collaboration with the private and academic sectors through business chambers and federations (such as the Argentine Chamber of Tourism), as well as professional associations, NGOs and universities, which participate in tourism policymaking and in the management of tourism programmes.

The Federal Tourism Council is the key co-ordinating body and includes representatives from all provinces, the Autonomous City of Buenos Aires, and the national government. The Tourism Council provides a platform to discuss, reach consensus and co-ordinate common policies and strategies at the national level.

In 2025, the national tourism budget was ARS 41.1 billion.

Argentina: Organisational chart of tourism bodies



Source: OECD, adapted from the Secretariat of Tourism and Environment, 2026.

Tourism policies and programmes

Tourism in Argentina is guided by the National Tourism Policy and in accordance with the National Tourism Law. The Policy aims to consolidate tourism as a strategic driver of economic development, job creation and international reach while redefining the role of the government from direct intervention to facilitating conditions that stimulate private investment, innovation, competitiveness and the long-term sustainability of the sector. The strategic pillars of the policy are:

- Promotion of private investment and international competitiveness: establishing a stable, predictable and secure environment for investment, with efficient legal frameworks, tax incentives and reduced administrative bureaucracy.
- Regulatory simplification and modernisation: reducing unnecessary regulation, optimising administrative procedures and promoting co-ordination among national, provincial, and municipal jurisdictions.
- Development and diversification of the tourism offer: designing and supporting integrated tourism circuits, corridors and zones, supporting the value of heritage and natural and cultural diversity, and driving policies focused on efficiency, innovation and sustainability.
- Strengthening the private sector and local capacities: fostering public–private co-ordination to support MSME development and promote decent employment.

Each of the 23 provincial jurisdictions, and the Autonomous City of Buenos Aires, has its own tourism strategy, as well as official tourism agencies and private sector representatives, which set the sector's priorities within their respective jurisdictions.

Attracting and facilitating private sector investment is pivotal to the sustainable growth of the sector. The 'Tourism Doing Business: Investing in Argentina' guide, developed jointly with UN Tourism and with the support of the Development Bank of Latin America and the Caribbean in 2025, provides a comprehensive instrument focused on attracting tourism investment in Argentina. The guide outlines the country's competitive advantage, the unique characteristics of its regions, business opportunities, federal- and provincial-level tax incentives, and the new regulatory framework that promotes economic openness and private sector participation. To support the guide, the Private Tourism Investment Promotion Programme provides a website with centralised information on sector-specific incentives, investment opportunities and financing lines applicable to tourism projects. Tourism investment forums have also provided opportunities to foster connections between public and private stakeholders, showcasing projects, incentives and national investment promotion policies.

Argentina's International Tourism Promotion Plan identifies 28 markets and six lines of action including digital ecosystem and innovation; strategic alliances, co-operative partnerships and memberships; positioning the "Visit Argentina" brand and international communication; market intelligence and impact measurement; development of markets and commercial channels; and editorial and promotional support materials. Guides have also been developed to provide destinations with tools to facilitate the development and promotion of national tourism products. The Government is also working with specific destinations under the Best Tourism Villages initiative, led by UN Tourism to better position and promote their tourism offer (see box below).

The Visit Argentina Intelligent Agent will be integrated into the Visit Argentina website to provide multilingual conversational support to international travellers. It will operate through automated, asynchronous interactions without continuous human assistance, supporting tourists throughout all stages of their journey. The system aims to enhance digital personalisation, improve visitor satisfaction and increase tourism spending. Additionally, its internal analytics capabilities will help identify demand patterns, understand visitor preferences, optimise promotional strategies and better distribute tourist flows across destinations. In addition, key statistical data and knowledge is available from Argentina's Tourism Information System (SINTA) and the Promote Summer in Argentina programme provided support to tourist destinations during the summer season, by financing projects for the promotion, innovation and digitalisation of the tourism offer.

The "Elegí Argentina" promotional platform, launched in early 2024, offers travellers a showcase of benefits and discounts for travelling throughout the country. It is implemented jointly with the provinces, the private sector (associations) and the banking sector. Currently, the site brings together more than 3 000 benefits in tourism services, with particular emphasis on those provided by Banco de la Nación Argentina including interest-free instalment financing, signature-only loans and discounts on hotel accommodations, gastronomy, beach resorts, tickets, car rentals.

Argentina is pursuing a high quality and diversified tourism offer through the design and implementation of both regulatory instruments and voluntary mechanisms aimed at the development and competitiveness of the sector. The Argentine Tourism Quality System promotes improvement programmes and national and international standards related to sustainability, digitalisation and resilience, strengthening local capacities, supporting SMEs and promoting decent employment and inclusion. Following its 2025 update, the Quality System is a consolidated institutional co-ordination strategy for enhancing tourism services and positioning Argentina as a destination of excellence. The system is expanding through agreements with various provinces and sectoral associations to improve territorial development and local capacities.

Safe and secure tourism remains a priority for Argentina. The Recommendations Guide for a Safe Summer, launched in December 2025, provides recommendations to ensure a safe, calm, and enjoyable tourism experience. The Tourist Consumer Protection Program, introduced in 2024, allows all domestic or foreign tourists to file a claim through the National Consumer Arbitration System in the event of disputes related to the contracting and/or provision of tourism services in Argentina, with a resolution provided within 24 hours.

A strategic approach to position and promote tourism villages in Argentina

Since joining the UN Tourism 'Best Tourism Villages' initiative in 2021, Argentina has achieved significant results, with eight Argentine localities being honoured in 2025 – Caspalá, La Carolina, Caviahue-Copahue, Gaiman, Trevelin, Villa Tulumba, and with Carlos Pellegrini and Maimará making the list for the first time. Argentina joined the programme to help showcase its diverse rural tourism destinations, highlight the work of local communities, and position Argentina's tourism product to an international market. Key outcomes to date, include:

- Caspalá (300 inhabitants) increased its accommodation and gastronomy offer, reaching 5 establishments with a total of 50 beds, almost three times the amount before the award.
- La Carolina (300 inhabitants) has incorporated four new gastronomy establishments and two lodgings and has transformed into a "pedestrian" village.
- Trevelin (7 900 inhabitants) set up new establishments to enhance the tourism offer, reaching 1 580 beds. Since its first nomination in 2022, the number of beds has increased by almost 70% and tourists have increased by 28%.

In Argentina, the implementation of the programme includes comprehensive and strategic support from the national government, working in co-ordination with the selected local villages and prioritising actions of positioning and promotion. As a result, a high media impact has been achieved, with an average of one article published every two days, positioning Argentina with significant international impact from this initiative. Tangible local impacts have also been recorded, including at least eleven investments in tourism services, an increase in hotel capacity and a rise in visitor numbers across various destinations.

Argentina - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/96v8ny

Brazil

Brazil: Key tourism messages 2026

Tourism direct GDP	Tourism direct employment (2024)	Travel exports (2024)
-	4.0% of total employment (equal to share in 2023)	15.3% of total service exports (up 0.1 percentage points since 2023)

National tourism strategy: National Tourism Plan 2024-2027

Responsible government agency: Ministry of Tourism

National tourism budget: BRL 3.90 billion

Key tourism policy priorities and actions:

- *Strengthening professional qualification in tourism* – Expanding access to professional training and upskilling opportunities in the tourism sector with free training offered across multiple areas.
- *Promoting digital skills and the adoption of new technologies* – Integrating digital transformation and innovation content into training courses, addressing topics such as digital marketing, online customer services, and the use of technological tools to manage tourism businesses.
- *Expanding and simplifying access to credit for the tourism sector* – Providing credit facilitation and incentive programmes to support private sector investment to improve tourism infrastructure and services and/or the establishment of new tourism businesses.

Tourism in the economy and outlook

Tourism is an important economic sector in Brazil and offers strong untapped growth potential as it continues to recover from the shock of the COVID-19 pandemic. Travel and tourism supported 2.3 million formal jobs in 2024, or 4.0% of total employment. This was equal to the share in 2023 and slightly above the level in 2019, when the sector accounted for 2.1 million jobs.

In 2025, Brazil received a record 9.3 million international arrivals. This represents a 37.1% increase compared to 2024, when there were almost 6.8 million international arrivals. Spending by international tourists accounted for almost USD 7.9 billion in 2025, exceeding pre-pandemic levels in nominal terms by 31.2%. The top international inbound markets are Argentina (36.5%), Chile (8.6%), the United States (8.2%), and Paraguay (5.7%).

Tourism governance

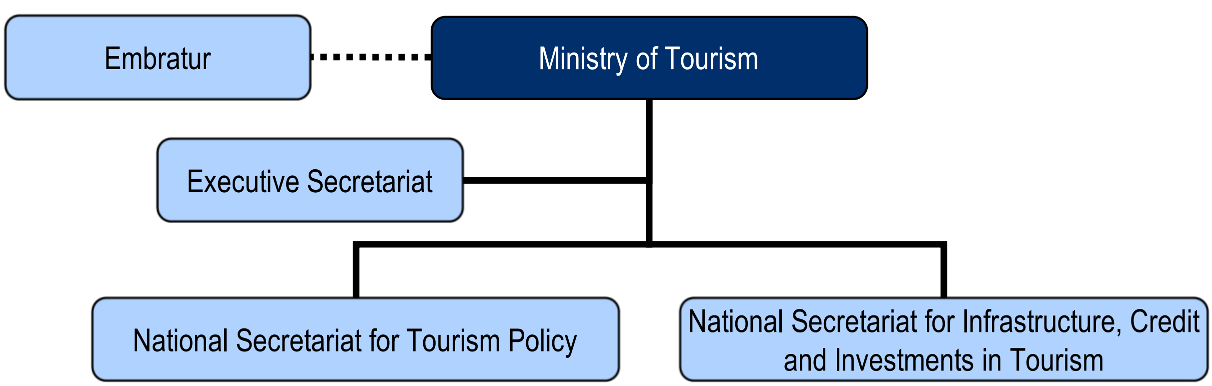
The Ministry of Tourism is the Federal authority in charge of tourism policy in Brazil. Among its main responsibilities, the Ministry develops, supervises, and evaluates tourism programmes across the country. It also promotes Brazil as a tourism destination, stimulates innovation, entrepreneurship, and investment in the tourism sector, fosters financing programmes and access to credit, through the General Tourism Fund, and inspects tourism service providers.

The Ministry of Tourism also collaborates with other ministries to formulate policies and programmes aimed at improving infrastructure, generating employment and income, and dealing with crises, resilience and climate action in tourism destinations. Since 2023, the reinstated Ministry of Culture handles the cultural agenda, allowing the Ministry of Tourism to concentrate solely on tourism matters.

Embratur, the Brazilian Agency for the International Promotion of Tourism, is a national organisation whose objective is to design, develop and implement actions for promoting Brazilian tourism products, services and destinations abroad, supervised by the Ministry of Tourism. Additionally, the Tourism National Council is made up of high level members and authorities from the executive branch, entities from various segments related to the travel industry and strategic players from the private and public sector, whose decisions are taken collectively.

Tourism is a shared competence in Brazil, designed and implemented at national, state and municipal levels. The Ministry of Tourism collaborates directly with regional and local authorities through its policies, as well as through collegial bodies established within the structure of the Ministry or created by federal entities. Regional Tourism Governance Bodies are multistakeholder co-ordination entities, established within Brazil's National Tourism Regionalisation Programme, that function as a decentralised governance mechanism. They bring together representatives from the public sector, private enterprises, and civil society to plan, implement, and manage tourism development strategies at the regional level.

Brazil: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Tourism, 2026.

Tourism policies and programmes

The National Tourism Plan 2024-2027 helps to guide tourism development in Brazil. The Plan is structured around three key pillars of development – social and guarantee of rights, economic and socio-economic and environmental sustainability, and defence of democracy and reconstruction of the State and sovereignty – and sets bold tourist arrivals targets: Brazil aims to welcome 8.1 million international tourists and 150 million domestic tourists by 2027, consolidating its position as the largest tourism economy in South America. Implementation of the National Tourism Plan is achieved through the development of various programmes, which are designed with contributions from the National Tourism Council and its Thematic Chambers.

The General Tourism Law, adopted in 2008 and updated in 2024, helps better attract and facilitate investment in the sector by modernising the regulatory framework, increasing legal certainty, and creating specific instruments to simplify the creation of new ventures. The legislation also provides for measures to improve the business environment, such as reducing bureaucracy, training the workforce, stimulating innovation, and integrating sustainability policies to promote a more efficient, transparent, and competitive tourism ecosystem.

The Plan and Law have established concrete goals for regional development and sustainability. They consolidate regionalisation instruments as government policy and formally recognise municipal, regional, state, and federal governance bodies as pillars of decentralised and co-operative tourism management in Brazil. The guidelines are complemented by the National Tourism Regionalisation Programme which aims to strengthen decentralised governance, encouraging the formation of Regional Tourism Governance Bodies and tourist circuits in line with national policies. This model allows for the adaptation of policies to local realities. These changes are creating a shift towards a more integrated, participatory, and results-oriented governance model, in which co-operation between federal entities, the private sector, and civil society is fundamental to the development of tourist destinations and the strengthening of sustainable territorial development.

Brazil has also committed to climate action. In March 2026, the Ministry of Tourism launched the Climate Adaptation for Tourism Programme within the scope of the National Tourism Plan. It comprises 24 goals to be achieved by 2027, ranging from financing sustainable initiatives to training professionals and strengthening risk management. These goals will serve as an official guide, with actions and monitoring tools, to make Brazilian tourism more competitive. Brazil aims to incorporate adaptive strategies into local and regional tourism policies, ensuring that the tourism sector is prepared to face the challenges posed by climate change, in line with the principles of responsible tourism and sustainability. In doing so, it contributes to Brazil's broader climate commitments and to the 2030 Agenda for Sustainable Development.

The priorities of the General Co-ordination for Qualification in Tourism have been updated to reflect the new demands of the labour market and the national guidelines for modernising professional training. There has been a stronger emphasis on digital qualification, regional inclusion, and sustainability as key pillars of training initiatives. The Qualifica Turismo Programme (2023–2025) offered free courses in areas such as hospitality, tour guiding, management, and foreign languages, targeting formal and informal workers, micro-entrepreneurs, and students. Training activities were carried out in partnership with S System Institutions, public and private universities, and state and municipal tourism departments. By the end of 2024, over 25 000 individuals had been trained nationwide. In December 2025, the Ministry of Tourism published the Professional Qualification and Productive Integration in Tourism Programme, within the scope of the National Tourism Plan. The programme establishes ambitious goals until 2027, involving the qualification of 21 000 people through actions that respect regional demand profiles.

Additional key programmes include:

- The Tourism Innovation and Competitiveness Programme: launched April 2026, it aims to stimulate the intelligent transformation of conventional destinations, as well as implementing and assisting the management of groups and networks focused on the creative economy and intelligence in tourism, strengthening governance, competitiveness, and the economic attractiveness of Brazilian tourist destinations.
- Standard for Smart Tourism Destinations: establishes the requirements and recommendations for Smart Tourism Destinations in Brazil. Launched in 2025 by the Ministry of Tourism, it aims to increase the competitiveness, sustainability, governance, technology, and accessibility of tourist destinations.

- REVIVE Brazil Programme: aims to redevelop idle public properties of historical and architectural value for tourism use, through concession and partnership models, promoting heritage preservation and local development (see box below).
- The Brazilian Long-Distance Trail Network: as part of a priority to improve connectivity and tourist mobility the Network connects conservation units, rural areas, and traditional communities, promoting nature tourism and active mobility.

Redevelopment of public heritage sites for sustainable tourism in Brazil

Brazil has a vast built heritage, often in a state of neglect or underutilisation. The lack of public resources for restoration and maintenance compromised the preservation of these assets and prevented their economic and social use. The challenge was to create a model for heritage enhancement that would reconcile conservation, tourism use, and local income generation without burdening the state.

The REVIVE Brazil Programme, inspired by the Portuguese model REVIVE Portugal, aims to repurpose underutilised public properties with historical, cultural, or architectural value to support the tourism sector. REVIVE Brazil utilises public-private partnerships and concessions of use, which allow the reuse of historic buildings for tourism purposes to establish hotels, cultural centres, restaurants, and other sustainable tourist facilities.

The programme establishes an innovative model of interministerial co-operation, with the Ministry of Tourism acting as the granting authority and the Ministry of Management and Innovation in Public Services responsible for the transfer of properties, in co-ordination with National Institute of Historic and Artistic Heritage and local governments. Each property is subject to technical studies, architectural designs, and concession notices guided by criteria of sustainability, economic viability, and positive sociocultural impact.

REVIVE Brazil has projects underway in different states, including Forte Orange (Pernambuco), Diamantina Railway Station (Minas Gerais), Fazenda Pau D'Alho (São Paulo), and Fortaleza de Santa Catarina (Paraíba). The expectation is to generate private investment in the redevelopment of public heritage, preserve listed properties, create direct and indirect jobs, and expand the range of cultural and historical tourist attractions and destinations.

Brazil - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/pixa5w

Bulgaria

Bulgaria: Key tourism messages 2026

Tourism direct GDP	Tourism direct employment	Travel exports (2024)
-	-	26.0% of total service exports (up 0.7 percentage points since 2023)

National tourism strategy: National Strategy for Sustainable Development of Tourism in the Republic of Bulgaria 2014- 2030

Responsible government agency: Ministry of Tourism

National tourism budget: EUR 14.7 million (2026)

Key tourism policy priorities and actions:

- *Creating favourable conditions for sustainable tourism development* – Strengthening actions on environmental awareness, climate change adaptation and resource efficiency for the tourism sector.
- *Developing a competitive tourism sector* – Optimising the regulatory framework to improve tourism sector support while improving the quality of products, human resources and digitalisation.
- *Successfully positioning Bulgaria on the global market* – Implementing targeted marketing while promoting specialised tourism products and cultural tourism.

Tourism in the economy and outlook

Tourism is an important source of employment and foreign exchange earnings in Bulgaria. Tourism contributed to over 227 000 jobs in the country in 2023, while travel accounted for 26.0% of all service exports in 2024.

In 2025, Bulgaria recorded over 4.1 million international tourists in accommodation establishments, an increase of 9.8% compared to 2024. The top three inbound tourism markets were Romania (23.8%), Ukraine (8.1%) and Germany (7.4%).

Domestic tourism continues to grow, maintaining record levels. In 2025 Bulgaria recorded nearly 5.4 million domestic overnight visitors in accommodation establishments, an increase of 2.9% compared to 2024. Domestic travel receipts in 2024 reached BGN 2.2 billion.

Tourism governance

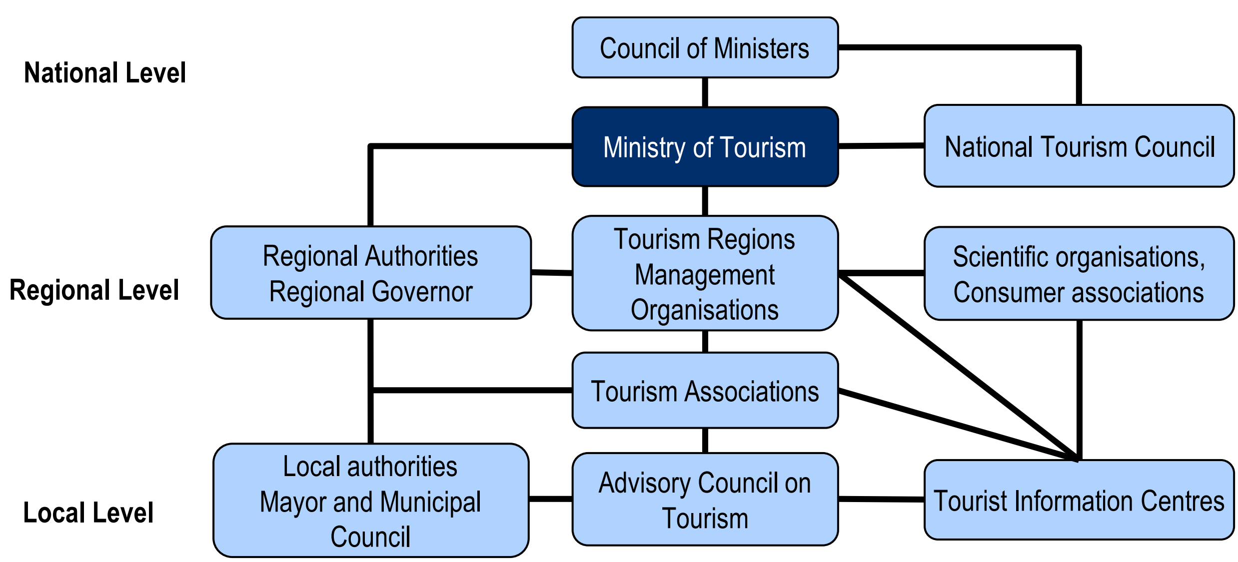
The Ministry of Tourism is responsible for implementing tourism policy at the national level. This includes the National Strategy for Sustainable Development of Tourism in the Republic of Bulgaria 2014-2030, along with an Action plan and the regulation of the tourism sector. The Ministry is also in charge of international marketing, co-ordinating the implementation of national marketing programmes, overseeing regional marketing strategies, and co-ordinating the implementation of tourism activities from other ministries and institutions. National tourism policy is formulated by the Council of Ministers.

The National Tourism Council is a consultative body operating under the authority of the Ministry of Tourism. Its members include representatives from tourism-related ministries, national, regional and local tourism associations as well as branch and product associations, transport operators and consumer organisations.

Regional (district) authorities oversee the implementation of the national tourism policy at the regional level. Nine Tourism Regions Management Organisations have been established to co-ordinate tourism activities. These organisations comprise tourism associations, municipal and regional representatives, scientific organisations, tourism schools and institutes, consumer associations and other stakeholders. Their main goal is to reduce regional disparities by creating strong regional brands and specialised tourism products based on local resources.

At the local level, municipal administrations are responsible for tourism development. The Municipal Council adopts a tourism development programme for the municipality aligned with the regional strategy, develops a marketing strategy and follows the local tourism resources and needs.

Bulgaria: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Tourism, 2026.

Tourism policies and programmes

The National Strategy for Sustainable Development of Tourism in the Republic of Bulgaria 2014-2030 guides national tourism policy in Bulgaria. The Strategy sets key goals to create favourable environmental and business conditions for the development of sustainable tourism. Other goals focus on developing competitiveness, positioning the destination successfully in the international market and creating balance development across tourism regions. Tourism is also supported by regional strategies and programmes across Bulgaria's 28 regions, and is integrated as a sector in the NUTS2 regional development plans. Nine marketing strategies for the Tourism Regions Management Organisations have also been prepared.

Tourism development in Bulgaria's regions is considered a core priority. Tourism is increasingly seen as a mechanism to mitigate the impacts of demographic decline and help to retain population in local communities. The Government supported over 40 regional festivals, events and thematic conferences in 2025, to boost visibility and stimulate local economic activity. Co-ordination with regional administrations is being reinforced to ensure effective implementation of regional tourism development strategies and to promote balanced, sustainable territorial development.

The development of tourism is directly dependent on environmental factors and the quality of natural resources, so efforts are being made by all stakeholders in Bulgaria to adapt to natural processes and reduce harmful impacts on the environment. This includes efforts to prepare the sector for adaptation to climate change through campaigns, training and awareness-raising events; to provide opportunities for financing measures for energy and resource efficiency of enterprises; and to introduce innovations and digitalisation in the sector.

To stimulate the development of tourism businesses and to increase competitiveness, there are efforts to improve the quality of tourism products and the presentation of Bulgaria as a tourist destination. Bulgaria is advancing a broad agenda to improve the regulatory framework governing the tourism sector, and support a more resilient, trustworthy and competitive tourism environment. In 2024, the government introduced planned amendments to the Tourism Act, including the following:

- Establishment of a Tourist Guarantee Fund, aimed at protecting consumer rights and ensuring the safety of travellers in the event of operator insolvency.
- Improved administrative regulation to simplify procedures and increase transparency in service provision.
- Enhanced supervisory powers for the Ministry of Tourism, enabling more effective control over tourism-related economic activities and ensuring high-quality service delivery.
- Introduction of formal requirements for short-term rental accommodations, addressing issues related to safety, standards, taxation and market transparency.

Additional efforts to improve competitiveness in the tourism sector include initiatives supporting its digital transformation, strengthening the digital presence and marketing capabilities of Bulgarian destinations, and the improving the tourism workforce. Initiatives for the tourism workforce include: developing State Educational Standards and National Examination Programmes for the professions from the new List of Professions for Vocational Education and Training; improving dual training in the tourism sector; raising the prestige of the professions among students and attracting Bulgarians working abroad; facilitating access for third-country nationals to the Bulgarian labour market; and providing 100 scholarships for Bulgarian students to study at the UN Tourism Online Academy.

Niche tourism markets continue to offer opportunities for high value tourism (see box below). Recognising the growing importance of health and wellness tourism globally, Bulgaria is preparing a Roadmap for the Development of Medical Tourism. This initiative seeks to capitalise on the country's medical expertise, natural resources and favourable pricing, while ensuring robust standards and international credibility. The Roadmap will outline investment priorities, quality assurance mechanisms and market development strategies. Cultural tourism also remains a priority area due to its potential to support regional development, reduce seasonality and enhance international recognition. Bulgaria is implementing a series of initiatives to promote cultural, festival, culinary, wine and pilgrimage tourism including organising an international conference on cultural tourism and participating in thematic international tourism exhibitions.

To support evidence-based policymaking, Bulgaria is developing new partnerships for more effective analysis of tourist flows. Improved data collection and analytical tools will enable policymakers to respond more rapidly to market shifts, identify growth opportunities and design targeted promotional activities.

A focus on expanding specialised tourism in Bulgaria

Bulgaria will continue to advance a results-oriented policy framework for the development of specialised and high-value niche forms of tourism in 2026, working in close co-operation with municipalities and regional authorities. The focus in 2025 was on wine tourism, with the highlight being Bulgaria's hosting of the 9th Global Wine Conference in Plovdiv and its accession to the European Federation Iter Vitis. Building on this strong momentum, strategic focus will shift toward cultural tourism in 2026. Cultural tourism is seen as a key driver of economic diversification, regional competitiveness, and year-round visitor demand.

From an economic standpoint, the Ministry's policy agenda for 2026 will prioritise:

- Enhancing the competitiveness of niche tourism products by improving infrastructure, service quality, and destination management at the municipal and regional level;
- Strengthening the value chain of local economies through partnerships with cultural institutions, SMEs, craftspeople, wineries, and local producers;
- Extending the tourism season by promoting experiences in off-peak periods that attract higher-spending visitor segments and stimulate repeat visitation;
- Encouraging investment through targeted promotion of regional assets and support for new product development in cultural, wine, rural, wellness, and adventure tourism.

A dedicated calendar of cultural-tourism events planned for 2026 will reinforce Bulgaria's positioning as an attractive international destination for sustainable and authentic cultural experiences. These initiatives will stimulate local economies, drive demand for hospitality and related services, and generate long-term economic impacts by strengthening Bulgaria's tourism portfolio with high-value niche products.

Bulgaria - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/wmtde6

Croatia

Croatia: Key tourism messages 2026

Tourism direct GDP (2022)	Tourism direct employment (2024)	Travel exports (2024)
12.2% of total GDP (up 0.4 percentage points since 2019)	7.1% of total employment (up 0.2 percentage points since 2023)	65.8% of total service exports (up 0.7 percentage points since 2023)

National tourism strategy: Sustainable Tourism Development Strategy 2030

Responsible government agency: Ministry of Tourism and Sport

National tourism budget: EUR 165.3 million (2025)

Key tourism policy priorities and actions:

- *Promoting regional development and tourism diversification* – Investing in inland areas and providing support for year-round tourism offers to extend the tourism season.
- *Transitioning to sustainable tourism models* – Focusing on reducing seasonality, managing visitor flow pressure, and protecting natural and cultural resources.
- *Balancing economic, environmental and social trade-offs* – Improving destination management and policy co-ordination and providing local and regional bodies with greater autonomy to make decisions.

Tourism in the economy and outlook

Tourism remains one of the key drivers of the Croatian economy. In 2022, tourism contributed approximately EUR 8.2 billion or 12.2% of GDP, confirming its structural importance for the national economy. In 2024, 105 700 persons were employed in tourism-related jobs, or 7.1% of total employment, reflecting a 6.9% increase in people employed compared with 2023.

The sector accounted for 65.8% of total service exports in 2024, generating EUR 15 billion in revenue, which represents an increase of 2.8% compared to 2023. According to data from the Croatian National Bank, in 2025, revenues from foreign tourists amounted to EUR 15.3 billion, representing a 2% increase compared to the same period in 2024.

International tourism continued its strong momentum and reached record levels in 2025, with over 17.6 million tourist arrivals and 85.6 million overnight stays, an increase of 1.4% in arrivals and 0.8% in overnight stays compared to 2024, the previous record year. The top international source markets in 2024 were Germany (17.7%), Slovenia (9.0%) and Austria (8.7%). Domestic tourism also grew strongly, with 2.9 million Croatian tourists staying in commercial accommodation in 2024, a rise of 8.7% from the previous year.

Tourism governance

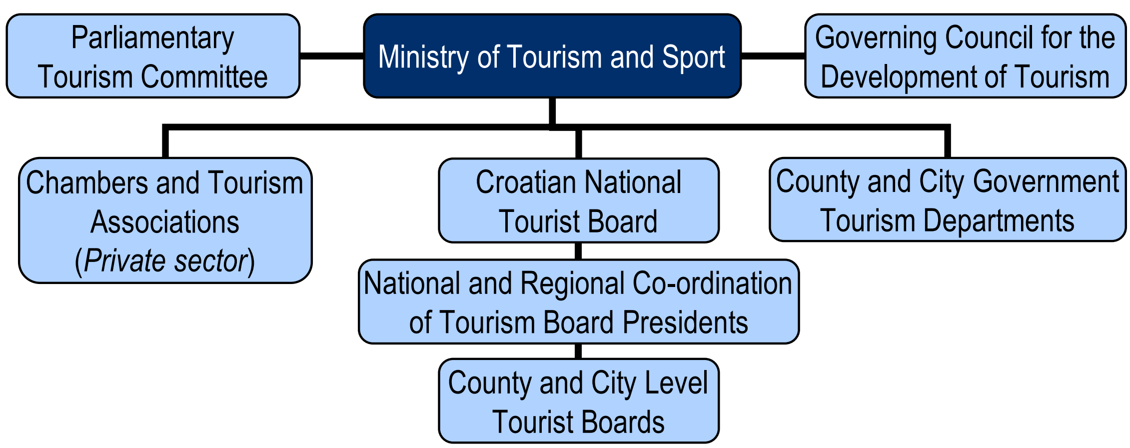
The Ministry of Tourism and Sport is the central authority responsible for defining tourism policy, legislation, strategic development, and co-ordination of tourism-related activities at the national level. It co-operates closely with the Croatian Chamber of Economy, the Croatian Chamber of Trades and Crafts and various professional associations within the tourism and hospitality sectors. The Croatian National Tourist Board, which operates under the Ministry, is responsible for the strategic promotion of Croatia in international markets and supports product development, marketing campaigns, and co-financing initiatives in co-operation with local and regional tourism boards.

At the regional level, 20 county administrative offices and the city of Zagreb have dedicated tourism departments that oversee the classification of accommodation facilities and issue permits for tourism-related services. At the local level, there are 298 municipal and city-level tourist offices responsible for developing tourism products, providing information services, and supporting local tourism economies. These offices operate under the co-ordination of county-level (regional) tourist boards.

The Ministry of Tourism and Sport actively collaborates with other ministries, public agencies and private sector organisations to ensure alignment of policies and implementation of cross-sectoral initiatives.

In terms of public financing, the Ministry's budget has grown significantly in recent years, from EUR 100 million in 2024 to EUR 163 million in 2025, reflecting an expansion of its projects and activities, particularly in sustainable tourism development, resilience, and the use of European Union funds.

Croatia: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Tourism, 2026.

Tourism policies and programmes

The Sustainable Tourism Development Strategy 2030, the National Plan for the Development of Sustainable Tourism 2027 and the Action Plan for the Implementation of the National Plan 2025 continue to offer strategic oversight of tourism in Croatia. Overall, the goal of the Strategy and Plans is to transform tourism in Croatia into a year-round, regionally balanced, and sustainable sector that improves the quality of life for residents while protecting natural and cultural resources, in line with the principles of green and digital transition.

The Tourism Act, adopted in 2023 and further operationalised in 2024 through implementing regulations, introduced a modernised legal framework focused on sustainable destination management. The Tourism

Act enables effective management of tourism development in the direction of sustainability, based on measurable data and the implementation of the green and digital transition. In addition to the Tourism Act, the following bylaws have been adopted:

- Regulation on the Methodology for Developing a Destination Management Plan
- Regulation on the Methodology for Calculating Carrying Capacity
- Regulation on Indicators for Monitoring Tourism Development and Sustainability, which includes indicators related to mitigating and adapting tourism to climate change.

The national level documents are supported by regional level strategies. The Tourism Act mandates the preparation of four-year local and regional Destination Management Plans aligned with national priorities, using tourism accounts and standard sustainability indicators. This allows authorities to manage tourism flows, assess carrying capacity, and balance economic, environmental, and social goals, with guidelines and support provided for consistent implementation. Croatia also provides detailed guidelines, templates, and support services to ensure consistent implementation.

Additional measures to promote regional development and diversification of tourism include:

- Developing specific forms of tourism: Through the National Recovery and Resilience Plan and other funding mechanisms, significant financial resources have been allocated to develop health, active, and sustainable tourism infrastructure, including spa and wellness centres, within the aim of extending the tourist season.
- Strategic marketing activities: The Croatian National Tourist Board implements annual work programmes focusing on promoting year-round tourism, encouraging visits to lesser-known destinations and strengthening Croatia's positioning as a sustainable destination.
- Legislative measures: New legislation is being implemented to curb short-term tourist rentals, including changes in taxation and stricter administrative requirements, with the aim of addressing housing affordability and availability for local residents.

In early 2025, additional amendments were made to three Acts in spatial planning, taxation, and tourism. The Building Management and Maintenance Act introduced stricter rules to protect the housing stock from excessive tourist use, while the Real Estate Tax Act replaced the vacation home tax with a more equitable property tax system that discourages speculative investment in short-term rentals. The Hospitality Industry Act defined the concept of the "local host" as a resident providing accommodation within their household, with the option of offering breakfast. Together, these measures directly address the challenges posed by unregulated short-term rentals. By curbing speculative property purchases, ensuring fair taxation, and legally distinguishing traditional family accommodation from purely commercial operators, Croatia is mitigating housing shortages, stabilising demographic trends, and ensuring that tourism growth benefits local communities.

The Sustainable Tourism Satellite Account of Croatia is in development as a national system to measure the economic, environmental, and social impacts of tourism in a standardised way. Once established, it will provide an evidence-based framework to guide data-driven policies, address key sustainability challenges, and support decision making that reflects local community needs.

Croatia is actively advancing sustainable tourism through multiple investment projects. Under the National Recovery and Resilience Plan, 72 contracts worth EUR 323 million have been signed, with 13 projects completed. Additional investments include 25 applications under the Investment Promotion Regulation (EUR 575 million), 24 projects under the Multiannual Financial Framework (EUR 51.3 million), and 376 projects via tourism development funds (EUR 11.5 million). These initiatives highlight strong progress in strengthening Croatia's tourism sector.

Croatia promotes sustainable tourism by using sustainability indicators, limiting visitors in sensitive areas, supporting eco-certification, investing in green infrastructure and low-carbon transport, and integrating climate resilience into planning. Initiatives also include circular economy practices, food waste reduction, and water-saving systems. The UN Tourism Centre for Sustainable Tourism Research and Development in Zagreb, established in 2025, will further boost innovation, research, and climate resilience, and strengthening Croatia as a leader in sustainable tourism (see box below).

The Ministry of Tourism and Sport has run workshops to educate over 700 stakeholders annually on community resilience, infrastructure, and quality of life. As part of broader efforts to engage local communities and improve tourism management, Croatia has also introduced the Local Host label. This initiative distinguishes and promotes high-quality hosts among existing accommodation providers. It emphasises responsible hosting, ensuring that rental properties meet safety, hygiene, and tax compliance standards.

To improve safety, investments have been made in real-time safety technology such as the “112 Croatia” app, currently being rolled out to provide emergency and disaster alerts tailored for both locals and tourists. Additionally, local Smart City systems in cities like Dubrovnik and Zadar integrate technology to enhance public safety and service co-ordination during high tourist seasons. Dubrovnik uses smart parking, license-plate recognition, visitor-counting, and crowd-management algorithms as part of its Respect the City initiative, which improves tourist flow, reduces congestion, protects heritage, and enhances residents’ quality of life through sustainable tourism.

Establishing the Centre for Sustainable Tourism Research and Development in Croatia

In 2025, the Ministry of Tourism and Sport, in co-operation with UN Tourism and the University of Zagreb, established the Centre for Sustainable Tourism to address the growing need for evidence-based, sustainability-oriented tourism policy.

The Centre serves as a hub for applied research, data monitoring, and policy support for tourism. It promotes integrated tourism governance based on scientific evidence and international standards, such as the UN Statistical Framework for Measuring the Sustainability of Tourism. Its focus areas include:

- Assessing tourism’s impact on natural resources, local communities, and employment,
- Evaluating the effectiveness of national tourism legislation, and
- Developing practical recommendations for more resilient and inclusive tourism strategies.

A key part of its mission is to support climate action in tourism by analysing low-carbon transport models, circular economy practices, and methods to reduce the sector’s carbon footprint. The Centre also works to foster co-operation among policymakers, academia, and industry to improve long-term planning and policy coherence. Through research, policy recommendations, and knowledge sharing, the Centre supports Croatia’s transition toward more sustainable, climate-resilient, and inclusive tourism.

Croatia - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/qlawmz

Egypt

Egypt: Key tourism messages 2026

Tourism direct GDP	Tourism direct employment (2025)	Travel exports (2024)
-	13% of total employment[1] (no historic data)	51.7% of total service exports (up 9.8 percentage points since 2023)

1. This number refers to all individuals working in hotels, touristic establishments, tour guides, yachting and marine activities, bazaars and touristic commodities in Egypt.

National tourism strategy: National Tourism Strategic Plan for the period 2025–2031

Responsible government agency: Ministry of Tourism and Antiquities

National tourism budget: -

Key tourism policy priorities and actions:

- *Highlighting the unmatched diversity of the country's attractions* – Launching global marketing campaigns that showcase unique heritage sites, natural landscapes, and cultural experiences to international travellers.
- *Driving foreign investment for tourism* – Creating a comprehensive, regularly updated Tourism Investment Map that highlights sector-wide opportunities.
- *Expanding tourism accommodation offering* – Increasing the number of rooms through the establishment of new hotels and the regulation of non-traditional accommodation.
- *Developing human resources in tourism* – Providing accessible online training in technical and soft skills for the tourism and antiquities workforce through a digital training platform.

Tourism in the economy and outlook

Tourism represents a fundamental pillar of the Egyptian national economy, serving as a critical driver of employment, foreign exchange earnings, and inclusive economic growth. In 2024, Egypt recorded an unprecedented 15.8 million international tourist arrivals, surpassing the pre-pandemic peak of 13 million in 2019. This recovery came primarily from European markets, which accounted for more than 10.2 million arrivals, representing 65% of the total. This reflected strong demand and enhanced air connectivity with major source markets such as Germany, Poland, and the United Kingdom. The Middle East was the second-largest source region, contributing 3.2 million visitors (20.5% share). International tourist arrivals to Egypt have continued their upward momentum in 2025.

The number of tourist nights exhibited a similar upward trajectory, rising from 136.3 million in 2019 to 164.4 million in 2024 – an increase of 20.6%. These increases led to a total of USD 15.3 billion in tourism revenues in 2024.

Tourism governance

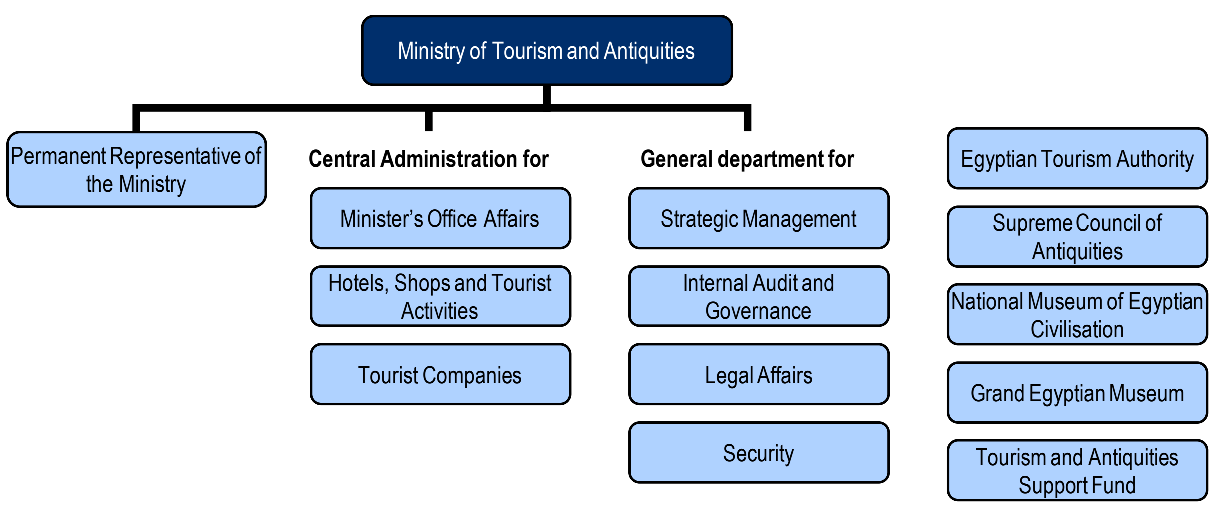
The Ministry of Tourism and Antiquities is the central authority responsible for formulating and implementing Egypt's tourism policy. Its mandate includes establishing a coherent legal and regulatory framework for tourism development, as well as safeguarding and preserving Egypt's rich heritage and ancient history.

The Egyptian Tourism Authority operates under the Ministry and is responsible for promoting both inbound and domestic tourism. It oversees the development and diversification of Egypt's tourism offerings, ensuring alignment with regional and international market trends. The Ministry also oversees the Egyptian Tourism and Antiquities Support Fund, a dedicated financial mechanism established to provide sustainable funding for both the tourism sector and the antiquities sector. The Fund pools resources from multiple revenue streams to finance promotional campaigns, conservation projects, and infrastructure development, while also ensuring crisis-response capacity for the sector.

The Egyptian Tourism Federation (ETF) and its affiliated chambers represent the interests of the private sector and maintain close collaboration with the Ministry. The ETF contributes to the formulation and implementation of Egypt's national tourism strategy and provides input on tourism-related legislation and regulation.

The Ministry of Tourism and Antiquities recognises the importance of an effective institutional framework that enables horizontal co-ordination across ministries and public institutions. Two key bodies include the Cabinet Tourism Committee, chaired by the Prime Minister and composed largely of governmental representatives with private sector participation, and the Cabinet Tourism Advisory Council, which is predominantly constituted by private sector stakeholders.

Egypt: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Tourism and Antiquities, 2026.

Tourism policies and programmes

Tourism in Egypt is guided by the National Tourism Strategic Plan, adopted in December 2024, for the period 2025-2031. The Strategic Plan aims to help achieve sustainable economic security in tourism and antiquities in a way that positively impacts society and the economy and contributes to enhancing national social development. The overarching goal is to increase international tourist arrivals to 30 million by 2031. The Plan is structured around six strategic pillars:

- Enhancing the competitiveness of tourism investment to attract increased levels of foreign investment.
- Leveraging Egypt's tourism diversity as a core element of the country's marketing strategy.
- Developing human resources and building human capital across all sub-sectors.
- Advancing governance and oversight tools within tourism and antiquities, while improving the overall visitor experience through upgraded services.
- Promoting sustainability initiatives and advancing the digital and environmental transformation of the sector, ensuring long-term sector resilience.
- Designing and implementing a comprehensive and effective marketing strategy to promote Egypt's destinations and products.

To achieve the 2031 target, the Plan places particular emphasis on strengthening the supply side of Egypt's tourism sector, expanding hotel capacity and the number of inbound airline seats to sustainably accommodate rising international demand. In 2024, Egypt added 7 200 new hotel rooms, with more than half representing newly established properties. According to a recent update in March 2026, about 40 000 to 50 000 hotel rooms are currently under construction.

The Plan also outlines key priorities and initiatives to be implemented in the coming years, aimed at achieving the sector's strategic objectives and enhancing its global competitiveness. These include:

- Expanding tourism products – Broaden Egypt's tourism portfolio to attract a more diverse visitor base. This includes the development and promotion of MICE tourism, yacht and nautical tourism, medical and wellness tourism, eco-tourism, rural tourism, and sports and adventure tourism. These are being developed alongside traditional cultural and coastal tourism products to offer a more integrated experience.
- Diversifying source markets – Target a wider spectrum of international markets to build resilience against external shocks and enable more sustainable growth. Egypt has intensified its efforts to attract new and emerging markets in Asia, Latin America, and Eastern Europe, while maintaining strong relations with traditional markets in Europe and the Arab region.
- Increasing hotel capacity – Increase the tourist accommodation supply from 228 000 rooms to 484 000 rooms by 2030 (per the March 2026 update).
- Promoting investment opportunities – Launch a flagship initiative to create a comprehensive, regularly updated Tourism Investment Map that highlights sector-wide opportunities.
- Regulating non-traditional accommodation – Establish a formal framework for holiday homes and alternative lodging options, setting out the mandatory facilities, specifications, and amenities required.
- Developing cross-border tourism co-operation – Develop tourism products with neighbouring countries, such as the Holy Family Trail in partnership with Jordan.
- Digital training platform – Provide accessible online training in technical and soft skills for the tourism and antiquities workforce. The platform focuses on technical knowledge and soft skills, directly contributing to improved service quality and tourist satisfaction.
- Smart ticketing systems – Expand digital ticketing across archaeological and tourist sites to streamline access and improve visitor experience. The Ministry of Tourism and Antiquities is implementing a digital ticketing system to support individual sites to enhance digital, contactless entry, and online booking capabilities. This phased initiative improves visitor flows and operational management at key locations like the Pyramids of Giza, the Egyptian Museum, Luxor and Karnak Temples.

- Sustainability of attractions – Protect vulnerable archaeological sites from environmental and human pressures through sustainable management. The initiatives focus on key actions, including conservation and restoration projects for monuments threatened by environmental factors or urban expansion, and deploying advanced monitoring systems to prevent structural damage. To manage visitor impact, the strategy enforces capacity limits and controlled access in sensitive areas, while promoting responsible tourism through awareness campaigns. These measures provide better facilities while securing the long-term protection of archaeological sites.
- Green transition – Promote clean and renewable energy adoption while encouraging compliance with environmental certification standards (see box below).
- Global digital marketing – Leverage international digital infrastructure and technologies to strengthen Egypt's global visibility and competitiveness.
- Facilitating travel access – Egypt is working to modernise its visa system to integrate all types of tourism visas within a unified framework to simplify entry procedures, improve accessibility for inbound tourists, and ensure a smooth and efficient travel experience for tourists.

Transitioning to a greener tourism economy in Egypt

In line with Egypt's national goals for environmental sustainability and climate action, the Ministry of Tourism and Antiquities is supporting clean and renewable energy solutions. Key actions include:

- Expanding the use of solar and renewable energy systems in archaeological sites, museums, visitor centres, hotels, and tourism facilities.
- Encouraging hotels, resorts, and tourism companies to adopt sustainable practices and apply for recognised environmental certifications, such as Green Star Hotel, Travel life, Green Globe, Earth Check and ISO 14001.
- Promoting awareness among tourism stakeholders about the economic, reputational, and environmental benefits of transitioning to clean and renewable energy solutions.
- Supporting partnerships with the private sector and international organisations to finance and implement clean energy projects in tourism-related infrastructure.

These efforts contribute to reduce the sector's carbon footprint and positioning Egypt as an environmentally responsible destination, in line with global sustainability standards.

Egypt - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/ismatd

Indonesia

Indonesia: Key tourism messages 2026

Tourism direct GDP (2023)	Tourism direct employment	Travel exports (2024)
4.7% of total GDP (up 0.9 percentage points since 2022)	-	42.8% of total service exports (up 1.2 percentage points since 2023)

National tourism strategy: National Tourism Strategic Plan 2025-2029

Responsible government agency: Ministry of Tourism

National tourism budget: IDR 1.9 trillion (2026)

Key tourism policy priorities and actions:

- *Diversifying the tourism offer* – Building tourism destinations to improve equality and economic development, including through the Tourism Village Development initiative to enhance the tourism offer while better dispersing visitors outside of major tourism hubs.
- *Improving the quality of tourism* – Implementing the Quality Tourism Development Strategy to attract high-spending tourists, focusing on special interest areas like gastronomy, marine tourism, wellness, traditional textiles, art and design.
- *Developing tourism events* – Organising quality and iconic events which enhance destination attractiveness and economic impact and promote Indonesian tourism on the global stage.

Tourism in the economy and outlook

Tourism is a key driver of economic growth, regional development and employment in Indonesia. In 2023, the tourism sector accounted for 4.7% of the country's GDP, while employment in tourism industries reached 24.4 million people or 17.5% of total employment. Travel receipts reached USD 16.7 billion in 2024, up 19.3% compared to 2023.

In 2025, Indonesia recorded 15.4 million international visitors, up 10.8% compared to 2024. The top source markets were Malaysia (17.2%), Australia (11.4%), and Singapore (9.9%).

Domestic tourism continues to play an important role in Indonesia. In 2024, the country recorded 1.0 billion domestic visitors, a 21.6% increase compared to 2023.

Tourism governance

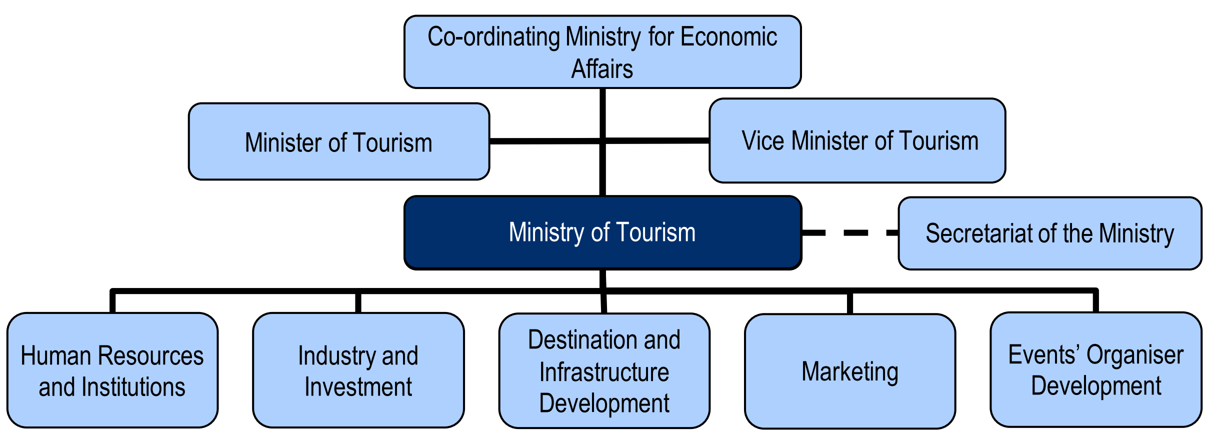
The Ministry of Tourism is responsible for tourism in Indonesia. The Ministry collaborates regularly with various stakeholders, such as the Ministry of National Planning, Ministry of Micro, Small, and Medium Enterprises, National Search and Rescue Agency, Ministry of Transportation, Ministry of Manpower, Ministry of Forestry, and the Ministry of Environment. The Ministry also collaborates regularly with the Ministry of Public Works and Housing in the development of tourism destinations, and especially in Indonesia's priority and regenerative tourism destinations.

The Co-ordinating Ministry for Economic Affairs has a Deputy for Industry, Manpower, and Tourism Co-ordination, which is responsible for synchronising and co-ordinating the preparation, formulation, and implementation of policies, as well as overseeing the execution of policies related to national development issues and agendas in the fields of industry, employment, and tourism. Within this framework, the Ministry of Tourism operates under, and is formally co-ordinated by, the Co-ordinating Ministry for Economic Affairs, ensuring policy coherence, alignment of national priorities, and integrated implementation across sectors.

Horizontal co-ordination is achieved through partnerships between ministries, national tourism associations (Indonesian Hotel and Restaurant Association, Indonesian Tourism Industry Association, Association of the Indonesian Tours and Travel Agencies), MSMEs, and the private sector. Vertical co-ordination is maintained through joint forums, such as the Clean Tourism Task Force, Risk-based Business Licensing Supervision Communication Forum, Indonesian Tourism Journalist Association, and policy alignment between central and regional governments via the State and Regional Budgets.

The tourism budget increased to almost IDR 1.9 trillion in 2026, up from IDR 1.5 trillion in 2025, to enable high performance targets, including increased foreign visitor and exchange targets.

Indonesia: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Tourism, 2026.

Tourism policies and programmes

Indonesia has entered a new phase of tourism development planning aligned with the national vision of Indonesia Emas 2045. This phase is guided by three key national planning instruments: the National Long-Term Development Plan 2025–2045, the National Medium-Term Development Plan 2025–2029, and the National Tourism Strategic Plan (Rencana Strategi Kementerian Pariwisata) 2025–2029. These frameworks position tourism as a strategic driver of inclusive, resilient, and sustainable economic transformation. Under the long-term development agenda, tourism is expected to contribute significantly to national competitiveness, and support structural economic transformation and regional development, with indicative targets for tourism of an 8% contribution to GDP by 2045 and foreign exchange earnings of up to USD 100 billion.

For the 2025–2029 period, tourism development is guided by six main policy directions:

- Improving the quality of tourism resources and institutions, including human capital development, organisational capacity, and institutional effectiveness.
- Developing competitive, sustainable tourism destinations and infrastructure, with attention to carrying capacity, accessibility, amenity quality, and regional balance.
- Strengthening investment for quality tourism development, supported by regulatory reform, financing instruments, and public–private collaboration.
- Using strategic and data-driven marketing to stimulate tourism demand, including digital promotion, branding, and market diversification.
- Developing high-quality tourism events, including MICE, cultural, sports, and thematic events that enhance destination attractiveness and economic impact.
- Improving the governance of the tourism sector, including policy co-ordination, regulatory quality, monitoring and evaluation, and the strengthening of the Ministry of Tourism's role as a policy leader and co-ordinator.

The Plan is supported by a set of targeted policies and instruments that guide tourism development in an integrated and sustainable manner. These include:

- National Tourism Destination Master Plan (Rencana Induk Destinasi Pariwisata Nasional), which provides comprehensive direction for the planning, development, management, promotion, and control of tourism destinations at the national and regional levels, ensuring alignment with spatial planning, environmental carrying capacity, and local development priorities.
- Quality Tourism Development Strategy, which aims to increase industry competitiveness by enhancing destination management, service standards, visitor experience, and community participation.
- Tourism Sector Decarbonisation Roadmap, which supports the transition towards a low-carbon, climate-resilient tourism sector through emissions reduction, resource efficiency, and climate adaptation measures, in line with national climate commitments.
- National Tourism Information System, designed to strengthen data governance and digital integration across the tourism sector. This system supports evidence-based policymaking, destination management and the acceleration of digital tourism transformation, including the integration of tourism crisis management data and early warning mechanisms.
- Tourism 5.0 Framework, which promotes the use of digital technologies, data analytics, and AI to enhance the entire visitor journey, from inspiration and planning to experiencing and sharing, while improving productivity, inclusiveness, and resilience across the tourism value chain.

The increase in AI and big data necessitates that the Indonesian tourism sector adapts to technological advancements to remain globally competitive. One of the initial steps in implementing Tourism 5.0 is the integration of AI into the indonesia.travel platform, which transforms into an all-in-one travel solution for the country. It is evolving into a smart, personalised, responsive, and practical travel assistant called MaiA (Meticulous Artificial Intelligence of Indonesia), which acts as a travel planner and companion and assists tourists throughout every stage of their journey: dreaming, researching/planning, booking, experiencing, and sharing.

Indonesia has transitioned its tourism focus towards regenerative tourism, emphasising quality, sustainability, and community impact. This is supported by the Clean Tourism Movement. In 2025, the Ministry of Tourism collaborated with local governments and strategic partners to improve destination cleanliness by performing awareness campaigns through clean action. The Movement was successfully implemented in fourteen destinations across ten provinces, involving more than 9 000 participants.

Indonesia is also continuing to build the Tourism Village Development initiative, which aims to diversify tourism and enhance the tourism offers while better dispersing visitors outside of major tourism hubs. The Tourism Village Programme is a nationwide initiative to transform rural areas into quality tourism destinations. The goal is to promote community-based tourism rooted in local cultural wisdom, sustainability and economic inclusivity. The programme aligns with Indonesia's national development goals and forms one of twelve strategic action plans for economic equality and poverty eradication in Indonesia. As of January 2026, 6 199 tourism villages have been registered in the national database.

To improve the quality of tourism resources and develop a competitive tourism sector, a task force was launched focused on regulating short-term rentals and enforcing stricter licensing and zoning controls (see box below).

Regulating short-term rentals in Indonesia

Short-term rental listings in Bali surged by 162% between 2022 and 2025, pushing legal villa occupancy rates below 30% and threatening the viability of licensed operators. This rapid growth in informal rentals has also led to unfair competition, reduced tax revenues, and contributed to unmanaged development in some local communities.

To tackle this, the Indonesian Government and the Bali Provincial Government jointly launched a central-local task force focused on regulating short-term rentals and enforcing stricter licensing and zoning controls based on Circular Letter of the Minister of Tourism Number 4 of 2025 concerning the Application for Registration and Licensing of the Provision of Tourism Accommodation. The policy response combines:

- Revising local regulations to close loopholes and align them with national laws;
- Introducing platform accountability requirements, obliging digital rental platforms to verify hosts' licenses and share data with tax authorities;
- Developing a centralised digital registry to track all licensed short-term rental properties in real time, improving tax collection, and destination carrying capacity management.
- Collaboration between central and regional governments to supervise and provide assistance and guidance to illegal investments to encourage them to obtain business legality.

This initiative aims to restore legal villa occupancy rates to around 80%, secure local tax income, and protect the livelihoods of compliant operators. More broadly, the policy supports sustainable destination management by balancing accommodation supply with infrastructure capacity and local community needs.

Indonesia - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/kunpo7

Malta

Malta: Key tourism messages 2026

Tourism direct GDP (2024)	Tourism direct employment (2024)	Travel exports (2024)
11% of total GDP (up 2 percentage points since 2023)	19.1% of total employment (up 1.7 percentage points since 2023)	10.7% of total service exports (up 1.0 percentage points since 2023)

National tourism strategy: National Tourism Strategy 2021-2030 - Recover, Rethink, Revitalise.

Responsible government agency: Office of the Deputy Prime Minister and Ministry for Foreign Affairs and Tourism

National tourism budget: EUR 133.6 million (for 2024, under previous organisational structure)

Key tourism policy priorities and actions:

- *Upskilling the tourism workforce* – Improving workforce education and skilling, including through the introduction of the 'Skills Pass' national certification system.
- *Harnessing sustainability to attract quality tourism* – Utilising a set of sustainable tourism indicators to improve destination management and supporting SMEs to become more sustainable and digital.
- *Embracing digital tools and smart technologies* – Building an open data platform and utilising AI to analyse diverse tourism data to gain insights into tourist behaviours in Malta.

Tourism in the economy and outlook

Tourism is an essential contributor to the Maltese economy. In 2024, total international tourist expenditure reached EUR 3.3 billion. Tourism is estimated to have contributed 11% to GDP, based on the GDP identity from the expenditure side. The tourism sector directly supported 61 100 jobs or 19.1% of total employment in 2024.

With approximately 3.6 million international inbound tourists, 2024 marked a new record year for the tourism sector in Malta, and an increase of 19.5% compared to 2023. The top three international visitor markets were the United Kingdom (20%), Italy (17%) and France (8%). Almost all top 15 geographical source markets saw strong growth rates. The growth continued in 2025 with 4.0 million inbound arrivals, an increase of 12.9% compared to 2024.

Domestic tourism increased in the years following the pandemic. While domestic visitor numbers decreased by 2.7% from 2023 to 2024, to 442 300 overnight trips, domestic visitor nights increased by 5.6% (to 1.2 million nights).

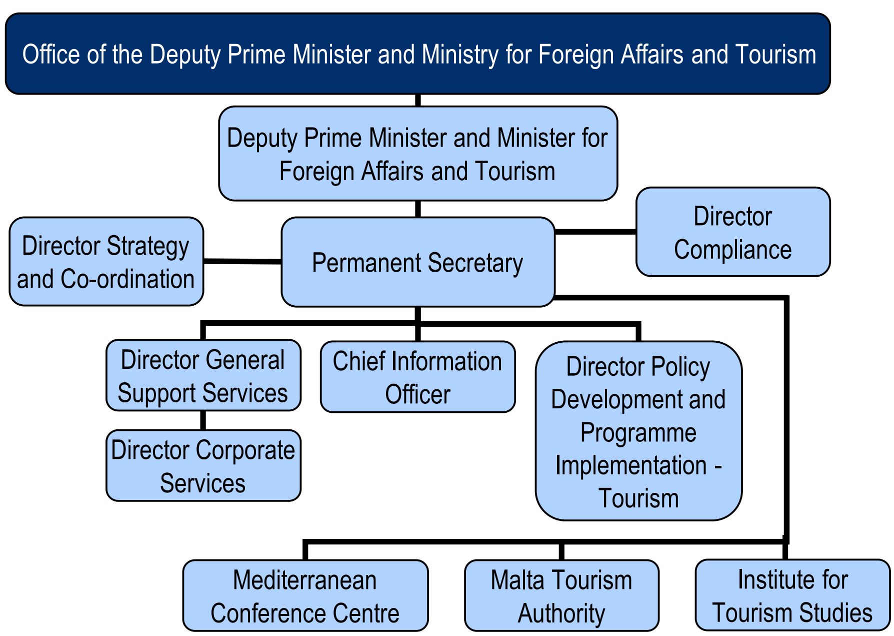
Tourism governance

The responsibility for tourism was transferred to the Office of the Deputy Prime Minister and Ministry for Foreign Affairs and Tourism in November 2024. The Ministry is responsible for the tourism sector at a holistic level, including education within the sector, which is essential for strengthening the country's tourism product. The Malta Tourism Authority (MTA) is the DMO under the Ministry's remit, responsible for promoting Malta as a tourist destination, advising the government on tourism operations and issuing licences under the relevant legislation. MTA also caters for the needs of all Maltese islands, liaising with the Ministry for Gozo, the Gozo Tourism Association, which represents Gozitan tourism stakeholders, and the Gozo Regional Development Authority. The MTA Board of Directors comprises members from the major tourism sub-sectors.

The recently established Tourism Sustainability Indicators Stakeholders Group brings together a variety of state agencies, academia and trade associations primarily to contribute to the compilation of data for the tourism sustainability indicators. It also functions as an informal forum to discuss tourism needs and impacts with a wide range of stakeholders (see box below).

The estimated budgetary allocation for tourism in 2024 was EUR 133.4 million from national funds and EUR 155 000 from EU funds. This was slightly below the allocation of 2023 (EUR 145.3 million from national funds and around EUR 2.6 million from EU funds). Due to changes in the organisational structure in 2025, the budget for 2024 cannot be compared with subsequent budgetary allocations.

Malta: Organisational chart of tourism bodies



Source: OECD, adapted from the Office of the Deputy Prime Minister and Ministry for Foreign Affairs and Tourism, 2026.

Tourism policies and programmes

Malta's National Tourism Strategy 2021–2030 is designed to recover, rethink, and revitalise the tourism sector in a sustainable and resilient manner following the disruption caused by COVID-19. The overarching goal is to build a stronger, more competitive, and sustainable tourism sector by 2030, with a focus on balancing economic growth, environmental preservation and social cohesion, while also addressing climate change.

To address ongoing skills shortages and improve tourism quality, Malta began to roll out the ‘Skills Pass’ in May 2024. This is a national certification system which aims to train hospitality and tourism workers to have the skills, knowledge and attitude to deliver quality service. The Skills Pass sets a clear benchmark for competence, and candidates require the Skills Pass to move forward in the recruitment or work permit process. Malta is also delivering a training programme for existing tourism employees and is working to promote tourism-related career opportunities to students.

Sustainability is now being considered a core requirement to improve the quality of tourism in Malta. A tailored set of 37 indicators was developed through the EU Technical Support Instrument, supported by the European Commission (SG REFORM) and the OECD, can now be used to inform and enhance evidence-based policy development and sustainable destination management in Malta. It builds on existing frameworks and good practices at international, national and regional level. Indicator selection was informed by key policy priorities identified in the Malta Tourism Strategy and through stakeholder consultations. This work also presented a toolkit with five levers to incorporate tourism sustainability indicators into decision making for positive change in Malta, building the bridge from indicator selection to action.

To accelerate private sector investment in green and digital technology, MTA is participating in the EU-funded Cross-Re-Tour project. Cross-Re-Tour is a partnership between eight countries with the aim to support small and medium-sized enterprises (SMEs) in tourism to become more sustainable and more digital. The main areas of focus are water, energy, plastic, food, equipment/furniture, mobility, customer nudging and employee nudging in the tourism sector. Starting in September 2023, this 3-year project involves 3 phases:

- Phase one (completed) - gather information about the challenges faced by SMEs to invest in green and digital technology, and enable SMEs to evaluate their own digital and green readiness using a checklist tool developed for the project.
- Phase two (completed) - provide support to SMEs through business consultancy services in the areas of digitalisation, green technologies and nudging techniques. In Malta, 22 SMEs benefited from consultancy services in these areas. Webinars were also organised on each focus area with the aim of increasing awareness among tourism businesses.
- Phase three (in progress) – 10 projects in Malta are being implemented through a grants scheme designed for SMEs with a total value of EUR 300 000.

In the final stage of the project, Malta will host a 'Show and Share' event in April 2026, where all the projects carried out in EU countries, as part of the Cross-Re-Tour project, will be exhibited.

In 2023, MTA began a project to develop an AI Tourism Platform to modernise tourism data analysis by combining traditional statistical sources with big data and AI technology to enhance decision making in the tourism sector. The development of this infrastructure was completed in June 2025. This project was financed by the Malta Digital and Innovation Authority and implemented within the Sandbox framework. The platform collects information from traditional information sources, such as the National Statistics Office and MTA data, as well new 'big data' sources related to tourism, including short-term rental and hotel performance, tourist flows and tourist expenditure. This project also enabled the transition to digital data collection methods and automation of repetitive processes, which have helped to improve efficiency and speed in data collection and evaluation. The platform is currently available for internal use with limited public access available in the near future.

Finally, Malta is working to develop airline connectivity. Airline connectivity in Malta is yet to return to pre-Covid-19 levels however most scheduled services have been successfully expanded to operate year-round, helping to better manage visitor flows. The recent attraction of additional airlines, including Aer

Lingus, Lot Polish Airlines and Qatar Airways, provides additional networking opportunities for Malta to reach more lucrative long-haul markets.

Establishing a Tourism Sustainability Indicators Stakeholders Group in Malta

As a result of the work to formulate tourism sustainability indicators for Malta, supported by the European Commission and OECD, a strong working relationship was formed with the range of stakeholders who participated in the consultation. This resulted in the establishment of the Tourism Sustainability Indicators Stakeholders Group, led by the Malta Tourism Observatory.

The objective of this group is to bring together representatives from the most relevant cross-section of stakeholders who have an impact on, and/or are impacted by tourism. Organisations that have committed to participation in the group include the Gozo Tourism Association, the Energy and Water Agency, the National Statistics Office, Ministry for Environment, Energy and Public Cleansing, Jobs Plus (Employment), Identita’ (work permits for TCNs), Planning Authority, University of Malta, Climate Action Authority and SUNx Malta, while others are still considering participation.

While this group is informal, it provides an opportunity for participating organisations to collectively contribute to the indicators but also act as a forum to discuss tourism needs and impacts. This innovative and informal approach can help to create synergies and contacts between the various stakeholders.

Malta - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/ybzkd4

Montenegro

Montenegro: Key tourism messages 2026

Tourism direct GDP	Tourism direct employment	Travel exports (2024)
-	-	54.6% of total service exports (down 0.1 percentage points since 2023)

National tourism strategy: Montenegro Tourism Development Strategy 2022-2025

Responsible government agency: Ministry of Tourism

National tourism budget: EUR 3.9 million (Ministry of Tourism), EUR 3.2 million (National Tourism Organisation, EUR 9.9 million (tourism programmes) (2025)

Key tourism policy priorities and actions:

- *Adopting digital technology and AI in tourism* – Supporting digital innovation to improve technological capacity and competitiveness and utilising digital tools, including the Tourist Information System, to better monitor tourism.
- *Encouraging the green transformation of tourism* – Reducing tourism energy consumption through energy efficiency incentive programmes for the hotel industry and catering facilities.
- *Investing in tourism infrastructure* – Improving access to key tourism attractions and continuing the construction of ski centres across Montenegro.

Tourism in the economy and outlook

Tourism is central to Montenegro's economy, accounting for an important share of the country's GDP and employment. In 2024, travel exports accounted for more than half (54.6%) of the country's service exports. Preliminary data from the Central Bank of Montenegro estimates tourism revenues in 2024 to be EUR 1.5 billion, showing a decrease of 3.1% compared to 2023.

The country recorded 2.5 million international tourists in commercial accommodation in 2024, equivalent to levels in 2023. This resulted in 15.0 million overnight stays. The top three international markets in 2024 were Serbia (18.4%), Bosnia and Herzegovina (8.5%) and the Russian Federation (8.1%).

Domestic tourism represents a small component of overall visitor overnight stays in Montenegro, just 3.9% of nights in commercial accommodation in 2024.

Tourism governance

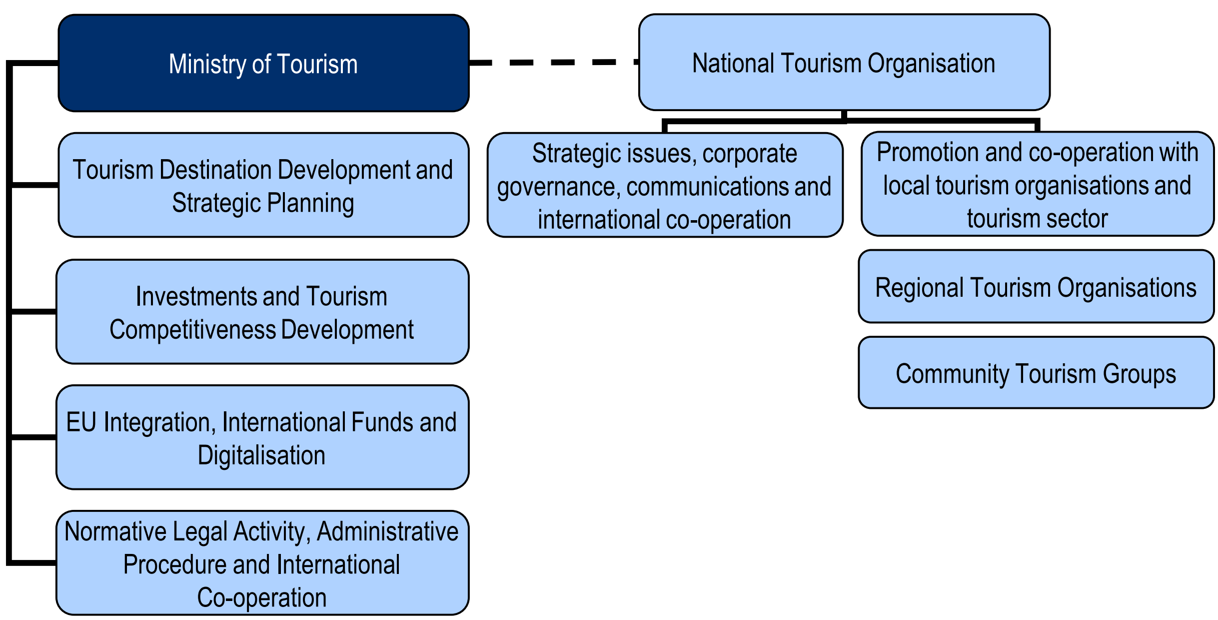
The Ministry of Tourism is responsible for tourism policy in Montenegro. In February 2025, the Regulations on the Internal Organisation and Systematisation of the Ministry of Tourism were adopted, which significantly changed and expanded the organisational structure of the Ministry of Tourism. The National Tourism Organisation of Montenegro and local tourism organisations also have a leading role in defining tourism development and destination management policies and creating tourism product. The role of local tourism organisations is defined by the Law on Tourism Organisations of Montenegro.

The Co-ordination Body for the Preparation and Monitoring of the Development of the Season was formed to create a responsible environment for the preparation and implementation of tourist seasons, with the aim of raising the level of tourism competitiveness in Montenegro. The Body meets monthly and includes representatives from ministries, local governments, state-owned enterprises and businesses that have a key role in the field of tourism.

The National Tourism Council, established in December 2022, aims to strengthen the tourism sector, nationally and internationally, by proposing, implementing and monitoring activities of importance for all tourism and tourism-related entities in Montenegro. The Council also works to raise standards in the tourism sector to better position Montenegro as a tourist destination, strengthen the economy through better integration of tourism, create a stable business and investment tourist environment, and improve tourist satisfaction.

The tourism budget for 2025 included EUR 3.9 million for the Ministry of Tourism, EUR 3.2 million for the National Tourist Organisation and EUR 9.9 million for capital projects.

Montenegro: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Tourism, 2026.

Tourism policies and programmes

The Montenegro Tourism Development Strategy 2022-2025 aims to guide the management of tourism in a sustainable manner, creating innovative, green and inclusive tourism products to increase tourist spending, and reduce seasonality and regional inequality, with the aim of raising the standard of living of the local population and tourist satisfaction.

The Strategy is implemented through annual action plans that define goals, measures and activities, both for the tourism sector and for other sectors directly and indirectly related to tourism. The 2025 Action Plan focused on strengthening institutional capacity while improving the capacity of inspection services and co-ordination, expanding digital solutions for greater innovation, improving tourist infrastructure and superstructure (including accommodation facilities), improving the quality and diversification of tourist products, developing human resources by improving knowledge and skills, and developing destination management and effective marketing.

Tourism development has been identified as a priority for the Montenegrin economy. Goals to elevate the quality of the tourism offer include increasing the number and capacity of high-quality accommodation establishments in Montenegro. To achieve these objectives, the Government has introduced a set of changes in fiscal policy, the tax system, and legal regulations, to simplify procedures to obtain permits during the pre-investment phase. Montenegro has also concluded multiple international agreements on economic co-operation, mutual promotion, and protection of investments. Key reforms have focused on creating a stimulating tax system, and positioning Montenegro with a low VAT rate (21%) compared to regional competitors, alongside a competitive 15% VAT rate on hospitality services, including accommodation. Additional tax incentives are available for investors when developing four- and five-star hotels (see box below).

The Montenegro Quality project aims to enhance tourism quality and enrich the tourist experience. The project includes the introduction of a quality mark for tourism entities, education for tourism workers, surveys of the population on tourism attitudes and analysis of digital marketing for the tourism industry. The quality mark is awarded in three levels: gold, silver, and bronze, reflecting the commitment to continuous improvement in tourism services.

The digitalisation of the tourism sector is pivotal for improved innovation and competitiveness. The Ministry of Tourism and the United Nations Industrial Development Organisation are implementing the project "Supporting the Transition to Tourism Industry 4.0 in Montenegro Led by Digital Technologies", dedicated to digital innovation in cultural heritage, with a special emphasis on 3D digitisation and digital storytelling. The project supports SMEs introduce digital technologies and innovation in tourism, culture and related industries to improve competitiveness, foster the creation of high-value products, promote employment and sustainable economic development.

The new Tourist Information System, adopted in July 2025, will provide a platform to enable automatic monitoring, better records and data transparency, the automation and acceleration of processes, reduction of administrative burden and better identification of informal tourism activities. Budget has been allocated for the development, testing, implementation, monitoring, evaluation, and guaranteed maintenance of a functional Tourist Information System.

A key step for the green transformation of Montenegro's tourism sector is the reduction of energy consumption, energy intensity and carbon dioxide emissions. The Ministry of Tourism in co-operation with the Ministry of Energy, and with the support of the European Union has initiated a programme to establish a financial mechanism for improving energy efficiency and increasing the use of available sources of renewable energy by hotel facilities. Preference is given to hotels that operate throughout the calendar year and that operate in the northern region of Montenegro. The funds allocated by the programme are used to cover part of the eligible costs of projects that could include improving the energy performance of the building infrastructure, improving the efficiency of building heating and cooling, water heating systems or lighting, installing solar powered electricity, or capacity-building to improve energy management and energy consumption optimisation. There is also a complementary energy efficiency incentive programme for catering facilities in households and rural households, offering up to EUR 20 000 in refunds per applicant.

Montenegro has identified the tourism valorisation of the northern region as a strategic commitment and development priority, particularly for tourist sports infrastructure. This is further complemented by the development of recreational, sports, health, and winter tourism. The overall aim is to enhance the development of this area and reduce disparities between the southern and northern regions of the country. A number of multi-year activities include the construction of new ski resorts (Žarski Ski Resort, Cmiljača Ski Resort and the Štedim–Hajla Ski Resort), continued modernisation of existing resorts (Kolašin 1600 and Savin Kuk Ski Resorts), and the construction of a tourism-speleological facility through the valorisation of Đalovića Cave, all in accordance with the highest international standards. The projects are financed through the 'Enhancement of the Tourism Offer' sub-programme of the Capital Budget

Investments in the implementation of these development projects include the construction of road infrastructure, access roads and parking areas, electrical and telecommunications infrastructure, water supply and wastewater systems, as well as service and hospitality facilities.

Utilising tax reform to incentivise investment in Montenegro

Montenegro is seeking to increase high-quality accommodation capacity through reform of the tax system. To incentivise investment, investors are exempt from paying import VAT on the supply of goods, and services for the construction of five-star hotels. Real-estate property taxes are reduced by 30% for four-star hotels and 70% for five-star hotels operating year-round. Additional incentives for five-star hotel construction include exemptions from fees for municipal land development.

Following the introduction of tax relief reforms for hotel construction in Montenegro in 2012, the number and capacity of four-and five-star hotels has increased significantly, with 38 new five-star hotels (approximately 5 560 beds) and 155 four-star hotels (approximately 17 400 beds) have been added to Montenegro's accommodation supply. As a result, the share of high-quality accommodation capacity as a proportion of total hotel capacity has increased significantly. In comparison to 2012, Montenegro now boasts more than half of all hotels in the four- or five-star category, compared to less than one-quarter in 2012, when the country predominantly had accommodation capacities in two-star category hotels.

Montenegro - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/6bk9iw

Morocco

Morocco: Key tourism messages 2026

Tourism direct GDP (2024)	Tourism direct employment[1] (2025)	Travel exports (2024)
7.3% of total GDP (up 0.5 percentage points since 2019)	8.2% of total employment (up 0.7 percentage points since 2022)	40.7% of total service exports (down 0.7 percentage points since 2023)

1. Calculated using tourism direct employment (number of jobs) and HCP aggregate employment data.

National tourism strategy: 2023–2026 Tourism Roadmap

Responsible government agency: Ministry of Tourism, Handicrafts, and Social and Solidarity Economy

National tourism budget: MAD 1.9 billion (2025)

Key tourism policy priorities and actions:

- *Stimulating tourism investment* – Encouraging tourism entertainment and accommodation upgrades through improved investment, supported by the "Go Siyaha" and "Moukawala Siyahia" initiatives.
- *Enhancing tourism competitiveness* – Strengthening the competitiveness of tourism actors through targeted technical assistance in digitalisation, market access, and yield management to deliver high-quality services and foster sustainable growth and resilience.
- *Developing the tourism workforce* – Upskilling and professionalising the workforce to meet the dynamic demand of the tourism sector through the "Kafaa" and "CAP Excellence Tourisme" programmes.

Tourism in the economy and outlook

Tourism is an essential pillar for socio-economic development in Morocco. In 2024, tourism directly contributed MAD 116.2 billion to the economy, representing 7.3% of the national GDP. The sector is also an important driver for employment in Morocco, directly providing 894 000 jobs in 2025, 92 000 more jobs than in 2022. According to data from IMF, in 2024, travel accounted for 40.7% of the country's service exports, or USD 11.5 billion, up from USD 10.6 billion in 2023.

Morocco recorded a new high of 19.8 million international tourists in 2025, reflecting a 14% increase compared to 2024. France was the leading source market for tourist arrivals to Morocco (29%), followed by Spain (23%) and the United Kingdom (7%). Domestic tourism also makes up a significant share of overnight stays, with 12.1 million overnight stays recorded in classified tourist accommodation establishments in 2025, up 3% from 2024.

Travel receipts amounted to over MAD 138.1 billion by the end of 2025, compared to MAD 114.5 billion in 2024, marking a year-on-year growth of 21%.

Tourism governance

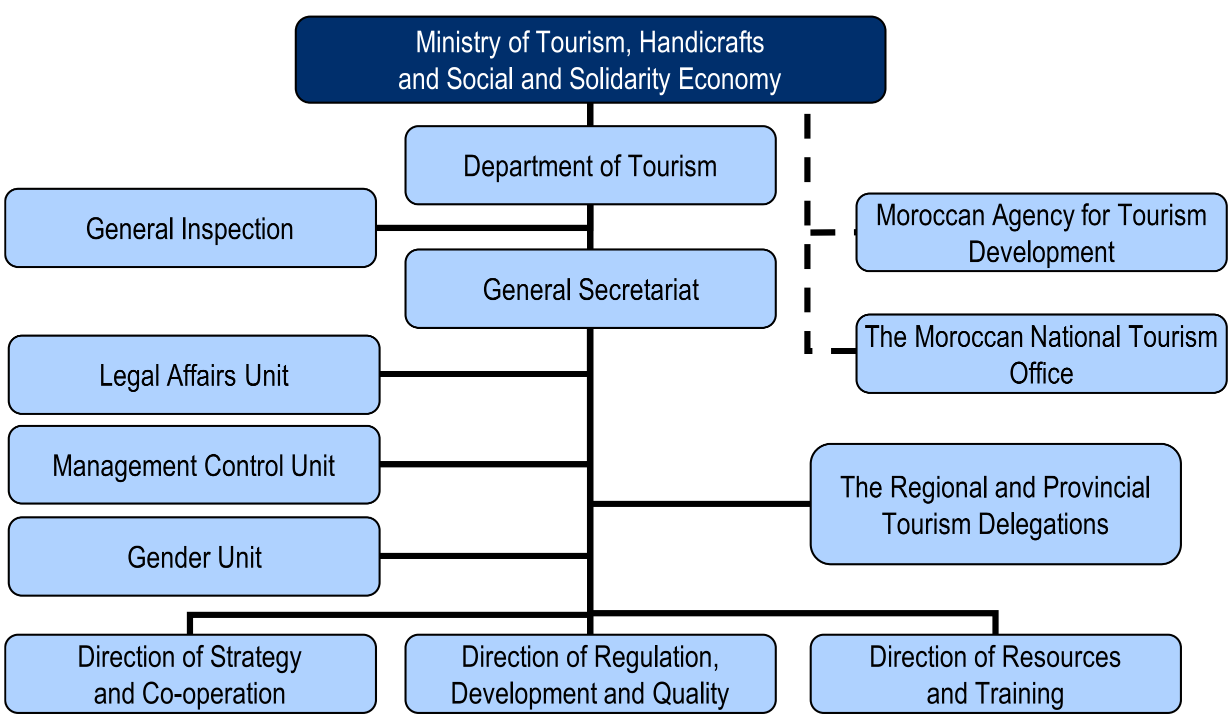
The Department of Tourism sits within the Ministry of Tourism, Handicrafts, and Social and Solidarity Economy and is responsible for developing and implementing government policy on tourism, supporting the sector's workforce and overseeing the public agencies involved in tourism.

The Department of Tourism operates with dual responsibilities at national and regional levels through its decentralised services. The Department oversees the management of regional public services, as well as the implementation of public policies, and engages in the development and implementation of tourism-related programmes and projects at regional level. Decentralised services ensure the execution of directives and decisions from the national government authorities and programmes and projects at the local or provincial level.

The Moroccan National Tourism Office is tasked with promoting and marketing Morocco as a destination both domestically and abroad. The Moroccan Agency for Tourism Development is the public body in charge of tourism development in Morocco. The Agency actively implements the objectives of the Moroccan tourism strategy by conceptualising tourism projects. This includes identifying potential sites for tourism development, securing land, conducting market research and feasibility studies, promoting investment opportunities and enhancing private initiatives and public-private partnerships.

In 2025, the total Government budget for tourism was MAD 1.9 billion.

Morocco: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Tourism, Handicrafts and Social and Solidarity Economy, 2026.

Tourism policies and programmes

Tourism policy in Morocco is steered by the 2023-2026 Tourism Roadmap, a strategic plan designed to elevate the sector's contribution to the national economy and foster a resilient and integrated industry. The Roadmap reimagines the tourism offering, shifting towards a customer experience-oriented model. It is structured around nine thematic fields aligned with the most in-demand tourism products, as well as five cross-cutting fields designed to highlight Morocco's intangible heritage. Morocco has already surpassed its initial target of 17.5 million international tourists by 2026, reaching 19.8 million in 2025, reflecting a faster than expected growth trajectory.

The Tourism Roadmap is complemented by regional implementation contracts that represent a territorial adaptation of the national plan, encompassing all its key components and aiming to foster tourism development across the regions. The implementation contracts mobilise a range of stakeholders, including the Wilayas, Regional Councils, the Moroccan National Tourism Office, and the Moroccan Agency for Tourism Development. They are grounded in the specific positioning of each region and focus on priority tourism fields, leading to concrete projects involving local stakeholders.

The Roadmap has led to the launch of several key initiatives to stimulate investment in both tourism entertainment and accommodation upgrades, with the aim of enhancing the sector's attractiveness and competitiveness. To stimulate investment in entertainment, an integrated project bank was established to support investments in tourism animation and services by providing project profiles structured by region and thematic value chain, enabling investors to identify opportunities supported by detailed financial and technical data.

The "Go Siyaha" initiative aims to support more than 1 700 projects by 2026 to strengthen the entertainment offer, diversify the tourist experience, and boost the sector's competitiveness. Capitalising on more than 1 000 projects already in progress, the Go Siyaha program is being strengthened to support more high-impact tourism initiatives. From July 22, 2025, three major updates were introduced to make the programme more inclusive and tailored to the changing needs of entrepreneurs:

- Removal of the minimum investment threshold, allowing projects under MAD 1 million eligible to benefit from Go Siyaha's support.
- Expanded support for existing companies looking to develop new entertainment offerings.
- Technical assistance from the start-up phase, helping to structure projects and facilitate financing.

The "Moukawala Siyahia" initiative is led by the Regional Development Companies and seeks to boost the tourism entertainment sector by providing grants and tailored support to strengthen the tourism entertainment ecosystem.

An incubation programme has been launched to support the emergence of high-potential projects in digital tourism services, gastronomy, and leisure gaming. The program aims to support the development of 200 projects in Moroccan gastronomy, 100 projects in leisure gaming, and 60 projects dedicated to the digitalisation of tourism services and activities. Through financial support of up to MAD 400 000 per project and comprehensive mentoring, this initiative seeks to accelerate the emergence of innovative tourism products and enhance the overall visitor experience. These initiatives also help to strengthen the competitiveness of tourism actors through targeted technical assistance in digitalisation, market access, and yield management, complemented by dedicated support mechanisms. These efforts are crucial to delivering high-quality services and fostering sustainable growth and resilience within the sector.

In line with the Roadmap identifying enhancement of the hotel offer as a strategic driver of competitiveness, the "CapHospitality" support mechanism is designed to assist classified tourist accommodation establishments to carry out upgrade works. Furthermore, Morocco is introducing a new national classification system and introducing mixed-used projects to drive new investment (see box below).

Strengthening the tourism workforce focuses on upskilling and professionalising to meet the dynamic demand of the tourism sector. Efforts to professionalise informal and low-skilled operators focus on implementing a comprehensive Recognition of Prior Learning program and establishing new collegiate-level training pathways to improve formal education. The "Kafaa" programme also facilitates the recognition of professional skills acquired through accumulated experience in tourism. The sector is working to enhance training quality through specialised programmes targeted at middle managers, while repositioning the Higher International Institute of Tourism in Tangier as a centre of excellence.

A free continuous professional development system, including e-learning platforms and trainer capacity building, is also in place to maintain high standards across the tourism workforce. Professionals can access this system through ‘Tourisme Academy’, a digital platform dedicated to supporting, raising awareness, and sharing knowledge with tourism professionals in Morocco. In addition, the, “CAP Excellence Tourisme” aims to create a network of 12 centres of excellence dedicated to hotel and tourism training by 2026. It intends to update training programs and modernise tourism and hospitality institutes in close collaboration with industry professionals.

Driving investment for tourism accommodation in Morocco

Tourist accommodation represents a key pillar of the tourism value chain. Due to its strategic importance, both as a key factor in destination choice and as a central element of the visitor experience, the 2023-2026 Roadmap for Tourism places a strong emphasis on strengthening this segment. In line with this priority, and in close collaboration with its partners (including UN Tourism and industry professionals), Morocco has initiated a comprehensive regulatory reform of the accommodation sector to improve quality, diversify offerings, and enhance the overall competitiveness of Morocco’s tourism industry.

As part of this reform, Morocco is introducing a new national classification system, a major milestone for the sector. With three structural changes, this new framework aims to elevate standards and better reflect the essence of Moroccan hospitality, which is renowned for its warmth and authenticity. The changes include:

- A new star rating system for all establishments (e.g. hotels, hotel clubs, hostels, riads, kasbah), which will be based on both quality of services and facilities. This will allow tourists to compare easily and book with confidence.
- Quality checks based on key criteria will be performed using mystery guests to ensure quality matches the rating.
- The introduction of Attached Real Estate Residences designed for five-star and luxury establishments, these residences allow the development of villas adjacent to hotels, sold to private individuals while remaining under hotel management. The objective is to attract high-end real estate investment and to offer an exclusive guest experience tailored to the expectations of clientele seeking premium, differentiated services. These mixed-use projects are often attractive to investors, allowing them to recover expenses in the short-term through sales, while maintaining the long-term hotel investment.

Morocco - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/r9snkb

Peru

Peru: Key tourism messages 2026

Tourism direct GDP (2024)	Tourism direct employment (2020)	Travel exports (2024)
2.8% of total GDP (up 0.3 percentage points since 2023)	2.2% of total employment (down 1.9 percentage points since 2019)	51.4% of total service exports (down 4.2 percentage points since 2023)

National tourism strategy: Law 32392: New General Tourism Law

Responsible government agency: Ministry of Foreign Trade and Tourism

National tourism budget: PEN 491.5 million (2025)

Key tourism policy priorities and actions:

- *Updating the tourism regulatory framework* – Implementing the New General Tourism Law which establishes a comprehensive regulatory framework to promote the sustainable, competitive, and inclusive development of the country's tourism sector.
- *Utilising innovation to enhance tourism competitiveness* – Generating public value through the MINCETUR Lab which aims to enhance competitiveness and foster the adoption of innovative, multidisciplinary, and human-centred practices for tourism sector.
- *Driving social tourism and accessibility* – Co-ordinating the design and implementation of social tourism initiatives including through the "Accessibility Guide: Tourism for All".

Tourism in the economy and outlook

Tourism is a key sector of the Peruvian economy, directly contributing PEN 31.1 billion in 2024, a 23.3% increase compared to 2023 and representing 2.8% of Peru's total GDP. Tourism also generated approximately 1.3 million jobs, both direct and indirect, in 2024 which remains 10% below 2019 levels.

In 2024, Peru received 3.3 million international overnight tourist arrivals. This represents a significant increase compared to international tourist arrivals in 2023, which were 2.5 million, although it is still 26% below 2019 levels. The main source markets were Chile (22%), the United States (19%), and Ecuador (9%).

As with inbound tourism, domestic tourism showed a sustained recovery after the pandemic in 2024, reaching 44.1 million overnight trips, almost 19% above 2023 levels. Domestic visitors remain 9% below 2019 pre-pandemic levels.

Tourism governance

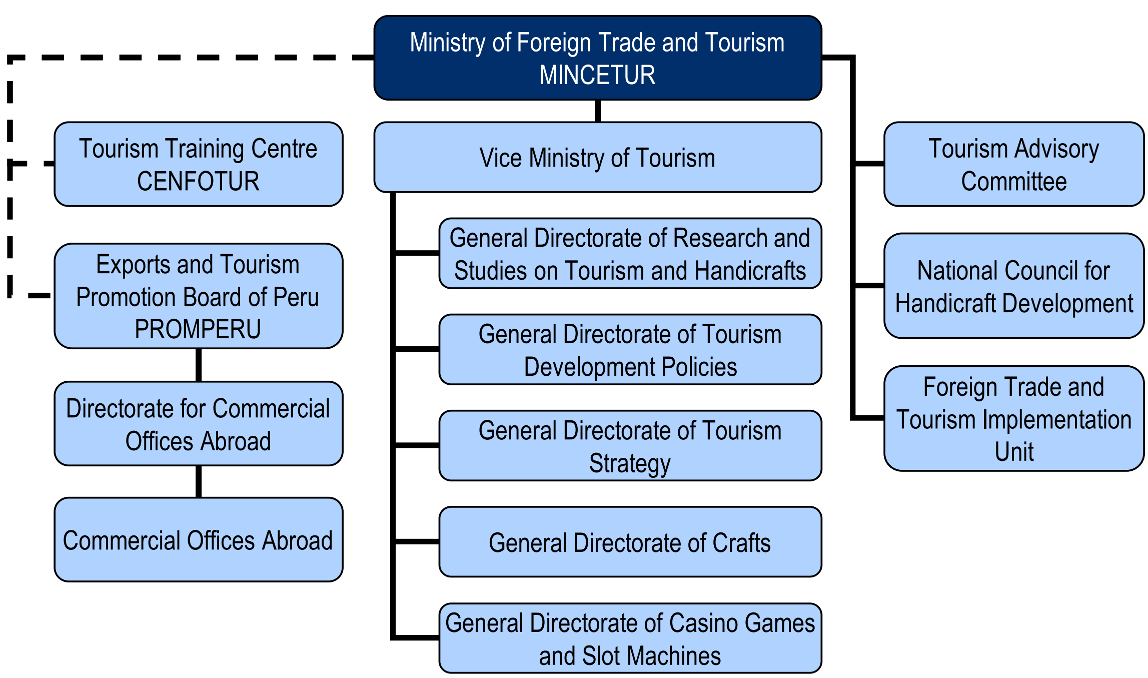
The Ministry of Foreign Trade and Tourism is the tourism sector's lead political and administrative authority. Its role is to define, direct, execute and co-ordinate the country's foreign trade and tourism policy in harmony with the general policy of Peru. The Vice Ministry of Tourism, part of the Ministry, oversees the General Directorate of Tourism Development Policies, responsible for implementing, evaluating and supervising tourism policy. The General Directorate also formulates and implements actions to improve the quality of tourism services, its environmental management, tourism facilitation, tourist protection, and the promotion of tourist awareness. The Vice Ministry of Tourism also oversees the General Directorates of Research and Studies on Tourism and Handicrafts, Tourism Strategy, Crafts, and Casino Games and Slot Machines.

The Ministry has two Specialised Advisory Bodies, the Tourism Advisory Committee and the National Council for Handicraft Development. The Tourism Training Centre and the Exports and the Tourism Promotion Board of Peru are also attached to the Ministry and operate Peru's Commercial Offices Abroad.

Regional governments are responsible for formulating, approving and executing policies relating to the development of regional tourist activity, qualification of regional tourist service providers, and co-ordination with local governments on tourism activities. They also maintain and update directories of tourism service providers, tourism resources, and regional events calendars.

At the national level, the total budget for tourism in 2025 is PEN 491.5 million, which represents an increase from PEN 339.6 million in 2024. The budget was split into PEN 186.5 million granted to the Ministry of Foreign Trade and Tourism, PEN 3.8 million for the Tourism Training Centre, and PEN 301.3 million to the Commission for the Promotion of Peru for Export and Tourism.

Peru: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Foreign Trade and Tourism, 2026.

Tourism policies and programmes

Peru have introduced a New General Tourism Law which declares tourism an activity of national interest and a priority policy for the State, recognising it as essential for employment, the economy, and environmental sustainability. The Law, adopted in 2025, establishes a comprehensive regulatory framework to promote the sustainable, competitive, and inclusive development of the country's tourism sector. The main aspects of the Law include:

- Promotion of public investment.
- Planning and management of tourism activity.
- Incentives for economic recovery.
- Promotion of community-based tourism.
- Formalisation and safety in adventure tourism.
- Positioning of gastronomic tourism.
- Tourism governance.

The Tourism Law establishes plans for the regional and local level. Regional Strategic Tourism Plans identify regional tourism and establish priority actions in accordance with the objectives and guidelines set in the National Tourism Policy. The participatory process is led by the regional government, with participation from local governments, the private sector, academia, and civil society, and follows the "Guide for the Preparation of the Regional Strategic Tourism Plan" document which establishes guidelines, instructions, and recommendations for formulating these plans, which are currently set in all 25 regions.

Local Tourism Development Plans provide a planning and management instrument that guides the tourism, social, and economic development of a locality. They define guidelines and priorities through a participatory process among public and private actors, considering tourism potential, demand, and other key factors. The "Methodological Guide for the Preparation of the Local Tourism Development Plan" sets out guidelines, tools, and recommendations for strategic planning of the sector at the provincial and district level, ensuring coherence and consistency with national, sectoral, and territorial policy objectives.

Fostering collaborative spaces among key stakeholders in the tourism sector can help to drive innovation. The MINCETUR Lab, created in August 2024, is an innovation lab dedicated to generating public value through collaborative methodologies, aiming to enhance competitiveness and foster the adoption of innovative, multidisciplinary, and human-centred practices for tourism sector. The Lab promotes innovative solutions to enhance quality and competitiveness in the sector through practical, applicable projects focused on technological solutions, policy design, social interventions, and knowledge generation. The Lab led to the development of a new modality to support the early phases of tourism entrepreneurship in Peru (see box below).

The significant potential demand for tourism in Peru from people with disabilities, older adults, and individuals with reduced mobility, who often lack access to properly prepared tourism services, is well recognised. Peru has set the "Guidelines for the Development of Social Tourism in Peru," which outline seven strategic lines of action, including: research and planning, design and development of accessible products, awareness and communication, capacity building, demand facilitation, institutionalisation and monitoring, and evaluation.

Peru has also published the technical document "Accessibility Guide: Tourism for All," which provides accessibility recommendations for tourism service providers and site managers. This initiative aims to promote the creation and adaptation of accessible tourism experiences that encourage the participation of these groups in tourism activities, supporting their fundamental right to leisure, rest, and an improved quality of life.

Early innovation for technology-based tourism entrepreneurship in Peru

One of the key challenges in the tourism sector is the scarcity of tourism ventures that incorporate technology at an early stage. While many new tourism services emerge in response to local opportunities, innovation and technological integration often appear later in the process or only in reaction to operational needs rather than being embedded in the original business concept.

The MINCETUR Lab, a public innovation laboratory, has designed and implemented a new modality within its national program "Turismo Emprende", which expands the scope of the traditional grant scheme by addressing an earlier phase in the entrepreneurship lifecycle – the idea creation and business model design. This new approach expands the program's scope and impact by incorporating intensive training, early-stage validation, and the application of emerging technologies into the creation of tourism ventures and aims to build entrepreneurial capacity from the ground up, ensuring that projects are more robust, market-aligned, and grounded in sustainability and innovation from the start.

The "Emprende Tec Turismo" pilot was carried out in Arequipa, a region selected for its strong innovation ecosystem and ongoing transformation into a Smart Tourism Destination. A national call for proposals was launched, targeting teams of 2 to 4 individuals with early-stage tourism business ideas. Out of 45 submissions, 22 teams were selected to participate in a six-week intensive training program led by three regional university incubators.

The training included mentoring, workshops on business development and sustainability, prototype creation, and hands-on sessions on applying emerging technologies in tourism. At the end of the program, 12 teams presented and defended their proposals to a panel of experts. Three ventures were declared eligible, each receiving up to PEN 25 000 (USD 7 000) in funding to implement their minimum viable product.

Peru - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/c8p1dl

Romania

Romania: Key tourism messages 2026

Tourism direct GDP (2023)	Tourism direct employment (2023)	Travel exports (2024)
2.4% of total GDP (equal to levels in 2022)	5.5% of total employment (up 0.2 percentage points since 2022)	13.3% of total service exports (up 0.8 percentage points since 2023)

National tourism strategy: National Tourism Development Strategy 2023-35

Responsible government agency: Ministry of Economy, Digitalisation, Entrepreneurship and Tourism

National tourism budget: RON 26.8 million (2025)

Key tourism policy priorities and actions:

- *Managing tourism at the destination level* – Developing DMOs that adhere to Romania's established legal framework and certification process.
- *Developing the tourism offer* – Developing and promoting niche tourism products, particularly related to rural, cultural, spa and ecotourism.
- *Promoting Romania internationally* – Considering the impact of marketing beyond advertising to include and encourage business participation at in-person events.

Tourism in the economy and outlook

Tourism plays an important role in the Romanian economy. In 2023, tourism directly accounted for RON 38.6 billion, representing 2.4% of GDP. The tourism sector directly accounted for 5.5% of total employment in Romania, representing 364 200 jobs.

In 2024, Romania recorded 2.4 million international overnight visitors in commercial accommodation establishments, 13.8% higher than in 2023, but still below pre-pandemic levels. The three main source markets were Germany (10%), Italy (9%) and Israel (6%).

Domestic tourism remains a critical component of Romanian tourism. Romania recorded 12.2 million domestic overnight visitors in accommodation establishments in 2024, 14% above pre-pandemic levels and 3.1% above 2023.

Tourism governance

The Ministry of Economy, Digitalisation, Entrepreneurship and Tourism is the national administration responsible for tourism in Romania. The main tourism-related fields of activity include:

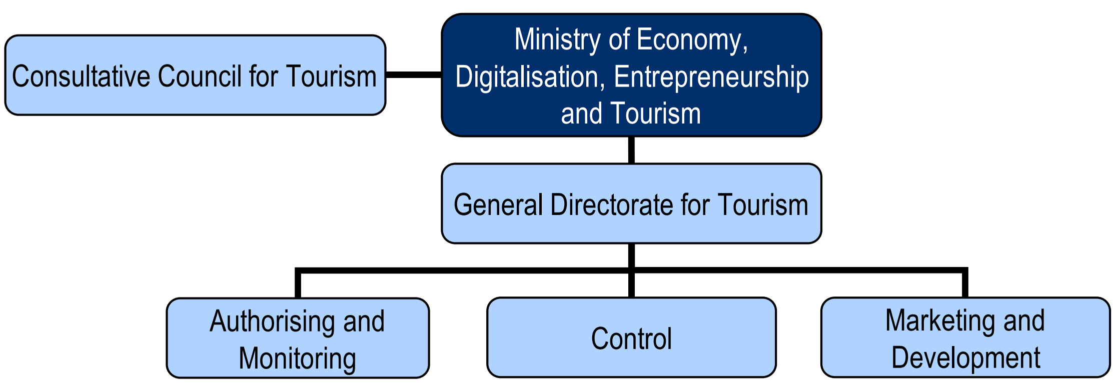
- Developing and implementing national and sectoral tourism strategies.
- Promoting Romania as a tourism destination domestically and abroad.
- Developing destinations and tourism products.
- Developing tourism-related infrastructure.
- Authorising and controlling tourism services.
- Representing Romania in international tourism organisations.

The Minister is supported by the Consultative Council for Tourism, which considers and discusses key aspects related to the implementation of tourism policies. The Council includes representatives of private companies, associations, federations, professional foundations, employers' organisations active in the field of tourism, and organisations supporting the business environment with members active in the tourism sector. The steering committee is composed of elected members, according to different areas of tourism activity.

Local administrations collaborate with the Ministry to implement tourism policies. In the National Plan for Recovery and Resilience, the Ministry included establishing DMOs as a priority. Romania now has 36 certified DMOs - 1 at the regional level, 9 at the county level and 26 at the local level.

In 2025, the tourism budget including the programme for tourism marketing and promotion and the programme for the development of tourist destinations, forms and products, decreased to RON 26.8 million from RON 55 million in 2024.

Romania: Organisational chart of tourism bodies



Note: The chart shows the section for tourism within the Ministry of Economy, Digitalisation Entrepreneurship and Tourism
Source: OECD, adapted from Ministry of Economy, Digitalisation, Entrepreneurship and Tourism, 2026.

Tourism policies and programmes

The National Tourism Development Strategy 2023-35, developed with support from the World Bank, aims to make Romania a well-known, high-quality, year-round tourism destination with a focus on the country's unique cultural and natural heritage, and high-quality services. The Tourism Strategy is supported by:

- National Strategy for the Development of Ecotourism – which guides efforts to capitalise on ecotourism in areas where nature and local culture occupy a central place, spanning the period 2019-2029.
- Strategy for the Development of Spa Tourism – which aims to modernise and expand spa infrastructure, as well as attracting investment to this high-potential sector. The Action Plan is still in development with a proposed timeframe until 2030.

Operationalising DMOs has been a long-term priority for Romania to improve tourism management at the destination level. Based on the existing legal framework for the establishment and operationalisation of DMOs on different levels and the procedure for certification of DMOs, there are now 36 certified DMOs in Romania (1 at regional level, 9 at county level and 26 at the local level). This includes 7 new county level and 8 new local level DMOs since 2024. In order to support the DMOs in developing their destination, they will be offered financing for undertaking investments in tourist infrastructure, through the National Recovery and Resilience Plan (NRRP). Work is also being undertaken to develop a national level DMO that will help to co-ordinate work across all DMOs in Romania, with its main objective being to develop and implement the tourism development and marketing strategy for destination Romania. This initiative has strong support from the Romanian tourism sector.

Romania is also working to develop the tourism offering, focusing on the specific categories of:

- Rural tourism: to promote diversity of the tourist offer in rural destinations, steps are being taken to promote the specialisation of villages located in the proximity of popular tourist resorts (see box below). Romania also actively participates in the UN Tourism Best Tourism Villages initiative.
- Culture tourism: Romania has established 12 cultural tourist routes and has committed to the creation/modernisation of nine museums and memorials, through the National Recovery and Resilience Plan. Romania also actively promotes cultural-tourist routes developed at local, regional or national level. Currently, over 150 cultural-tourist routes are recognised.
- Ecotourism: Building on the National Strategy for the Development of Ecotourism, a system was developed to evaluate ecotourism destinations in Romania, based on the Global Sustainable Tourism Council Global Criteria for Sustainable Tourism and the European Ecotourism Standard. At present there are 6 designated eco tourist destinations.
- Spa tourism: In addition to the Action Plan 2025-2030, designed to implement the objectives proposed in the Strategy for the Development of Spa Tourism, local administrations receive support to invest in spa infrastructure through the Master Plan of Tourism Investments. A state aid scheme is available to encourage tourism businesses to invest in tourist, spa, cultural, sport and leisure infrastructure in the vicinity of spa resorts, to diversify the tourism offer and to increase the quality of tourist and connected services, and to support the expenses related to the training of the workforce. This scheme provides a grant of up to 50% of the eligible expenses related to the project to a maximum for EUR 200 000.

Recognising the specialisation of villages in Romania

Rural tourism is a significant tourism product of Romania based on an authentic rural culture spread throughout the country in all historical regions and encompassing various geographical characteristics.

In March 2025, the Ministry of Economy, Digitalisation, Entrepreneurship and Tourism launched the programme ‘Recognising the thematic specialisation of villages from the vicinity of tourist resorts of local or national interest in Romania’.

The Programme aims to highlight the precious treasures of the rural culture which must be analysed, developed and promoted for the future generations. It focuses on folk art, cycling, traditional gastronomy, viticulture, fish-farming, collection of medicinal plants, plantations of aromatic plants, tangible and intangible cultural heritage, history, nature and tranquillity, balneology, animal husbandry, horse breeding, and pop-culture tourism. Proposals can be sent to the ministry by the local public authorities or DMOs according to the specialisations mentioned in the documentation.

More than 200 villages have been recognised for their specialisation, and an interactive map has been created to marking their location.

The promotion of Romania internationally remains a key priority and is done through participation in tourism fairs, organising familiarisation trips for journalists and travel agencies, outdoor campaigns and media campaigns. To support the participation of tourism businesses at national stands organised by the Ministry, a state aid scheme provides a grant for accommodation and transport expenses.

Romania - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/igflqv

Saudi Arabia

Saudi Arabia: Key tourism messages 2026

Tourism direct GDP (2024)	Tourism direct employment (2025)	Travel exports (2025)
4.9% of total GDP (provisional data) (up 0.5 percentage points since 2023)	5.4% of total employment (down 0.1 percentage points since 2024)	61.4% of total service exports (down 3.8 percentage points since 2024)

National tourism strategy: National Tourism Strategy, 2019-2030

Responsible government agency: Ministry of Tourism

National tourism budget: -

Key tourism policy priorities and actions:

- *Managing visitor capacity and safety* – Enabling competitive E-visas and the continued development of 'KSA Visa', a unified visa platform.
- *Encouraging tourism investment* – Utilising government-backed incentives and public-private partnerships to stimulate private investment and accelerate infrastructure development.
- *Developing and reskilling the tourism workforce* – Providing free tourism options for people with financial limitations and those belonging to groups with disabilities.

Tourism in the economy and outlook

Tourism is one of Saudi Arabia's fastest growing sectors and is considered essential for the country's economic diversification, employment, and sustainable development. Based on preliminary estimates, tourism directly accounted for SAR 231.5 billion or 4.9% of GDP in 2024, up from 4.4% in 2023. The sector also demonstrated strong performance in employment, directly supporting more than one million jobs in 2025, or 5.4% of the national workforce, representing an increase of around 6.2% compared to 2024 (966 500 jobs).

Inbound tourism reached 29.3 million international tourist arrivals in 2025, down 1.6% compared to 2024. Inbound travel receipts reached SAR 176.6 billion, reflecting a 5.0% growth compared to 2024. Leisure tourism continued to be a primary driver of inbound tourism growth. Domestic tourism also demonstrated significant growth, recording 93.3 million domestic tourists in 2025, up 8.0% on 2024. This led to domestic tourism generated revenues of SAR 127.1 billion up 10.0% on 2024.

In 2025, the Saudi Arabia tourism sector recorded 122.6 million overnight visitors, exceeding the Vision 2030 target of 100 million for the third consecutive year. This, in addition to considerable growth, has spurred Saudi Arabia to adjust to a more ambitious target of 150 million tourists by 2030.

Tourism governance

The Ministry of Tourism is responsible for defining tourism policy and regulating the tourism sector in Saudi Arabia, including tourism strategy, regulations, destination development, human capital development, and investment attraction.

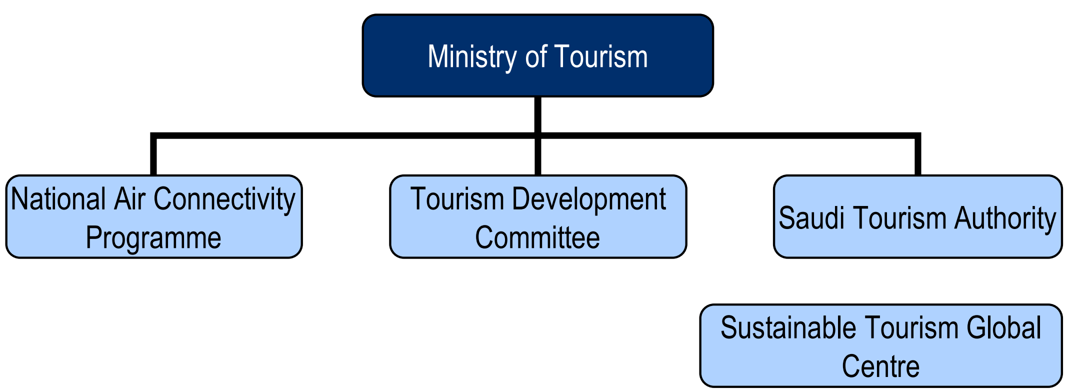
The Ministry co-ordinates with other government entities on tourism policy development through several mechanisms, including memorandums of understanding, joint committees and regular meetings with other ministries. The Ministry engages with the private sector on policy development through, for example, public-private partnerships, tourism councils and industry surveys.

The Saudi Tourism Authority is responsible for branding, marketing and promotional efforts with travel agencies and tour operators. Other entities such as the Air Connectivity Programme enables new route development, while the Tourism Development Fund supports the private sector to develop offerings and accommodations.

The tourism ecosystem works closely with all the relevant government entities, such as the Ministry of Culture, General Authority of Civil Aviation, General Entertainment Authority, Ministry of Foreign Affairs, Ministry of Interior, Ministry of Transport, Ministry of Electricity, Water and Agriculture, etc. This approach is being reviewed to deliver a streamlined and agile governance framework that adapts to the emerging needs of the kingdom's tourism sector.

Regional development authorities play a crucial role in developing and promoting tourism destinations. They are responsible for ensuring that the necessary infrastructure and services are in place to support the sector. The Royal Commission for Al-Ula is tasked with developing the Al-Ula region as a world-class tourist destination, while the Madinah Development Authority aims to enhance the tourism experience for visitors by redesigning and upgrading public spaces in the city.

Saudi Arabia: Organisational chart of tourism bodies



Source: OECD, adapted from Ministry of Tourism, 2026.

Tourism policies and programmes

The National Tourism Strategy, launched in 2019, guides the development of tourism the Kingdom of Saudi Arabia. The overarching goal of the strategy is 'to win people's hearts and minds by opening our doors to the world through a tourism sector where life-changing stories happen every day'. The core objectives of the Strategy were revised in 2023 due to achieving the 2030 target 7 years ahead of schedule and are now:

- Visitors: Reach 150 million visits.
- Economy: Support Saudi Arabia’s GDP by 10%, grow contribution of the private sector and direct foreign investments and unlock potential of the non-oil government sector.
- Employment: Provide 1.6 million job opportunities by 2030 to contribute to increasing employment.

Vision 2030 is supported by regional tourism strategies. Each region in Saudi Arabia develops its own strategy, where relevant, tourism is positioned as a key strategic pillar and aligned with the objectives of the National Tourism Strategy.

To better manage visitor safety and capacity during high seasons Saudi Arabia has launched 'KSA Visa'. This presents a unified visa platform and expanded e-visa accessibility to more than 66 countries. A new ‘Visa by Profile’ initiative has also been launched to accelerate visa decision making in collaboration with Visa and participating banks, using travellers’ credit scores (see box below).

To encourage tourism investment, Saudi Arabia is providing government-backed incentives and pursuing public-private partnerships to stimulate private investment and accelerate infrastructure development through Business Environment Reforms and Targeted Incentives. Saudi Arabia is advancing a co-ordinated set of policy measures to strengthen the enabling environment for tourism investment and expand private sector participation across the value chain. At the centre of this effort, the Tourism Saudi Business Center serves as the sector's dedicated one-stop shop, providing investors and entrepreneurs with a single access point to more than 200 services, spanning licensing, advisory, financing, and investor matchmaking. The Center is designed to improve administrative efficiency and streamline engagement across the full investment lifecycle. Complementing this, the Hospitality Enablers Program, launched by the Ministry of Tourism in March 2024, supports investment in hospitality assets within priority destinations to elevate the national tourism offering. Through a targeted package of exemptions, the programme reduces operating risk during the critical early years of asset stabilisation. In its first two years, the programme has enabled more than 20 projects, unlocking over 3 000 additional rooms and mobilising more than SAR 5 billion in investment.

Develop local tourism talent has led to investment in large-scale reskilling and workforce development programs. This includes enhancing tourism workforce development by promoting sector attractiveness, strengthening tourism career pathways, creating digital matching platforms, and prioritising employee retention and satisfaction.

Saudi Arabia currently serves as the Co-Chair of the UN Tourism Committee on Statistics, jointly with Austria, reflecting its leading role in advancing global tourism statistical systems.

The Kingdom is also progressing national efforts to measure tourism sustainability in alignment with the UN Tourism SF-MST framework. A structured database has been developed covering 30 sustainable tourism indicators across environmental, economic, and social dimensions. Of these indicators, 21 are directly linked to ten Sustainable Development Goals, ensuring coherence with national sustainable development priorities. Ten indicators are already fully measurable based on existing administrative and survey data, while work is ongoing with national partners to close remaining data gaps and operationalise the full indicator set. The results will be published progressively through national tourism statistical releases and future sustainability reports, forming an evidence base to support informed decision making in the sector.

Accelerating visa processing in Saudi Arabia

Saudi Arabia has introduced a new "Visa by Profile" initiative to accelerate visa processing times building on existing banking administrative information, the first of its kind worldwide. The initiative enables eligible Visa branded debit and credit cardholders to receive expedited visa processing using only their passport details and Visa card information, with qualified travellers able to obtain their electronic tourist visas within minutes.

Developed by the Saudi Tourism Authority in partnership with the Ministry of Foreign Affairs, the Ministry of Interior, and the Ministry of Tourism, in collaboration with Visa, and participating banks, the initiative seeks to remove barriers to travel, attract high-value tourists, and accelerate visa decision-making through digital integration and regulatory co-operation. It uses travellers' credit scores to ensure financial solvency through an automated digital check, streamlining approvals for millions of new travellers.

The Visa by Profile initiative is designed to fully automate the visa issuance process through seamless integration among government entities, airports, and digital systems operated by institutions such as credit bureaus and banks. The initiative will be available to banks wishing to participate and is set to launch in 2026, with continued expansion as more banks and credit-card issuers join the partnership.

Saudi Arabia - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/8vjr0g

Serbia

Serbia: Key tourism messages 2026

Tourism direct GDP (2023)	Tourism direct employment (2024)	Travel exports (2024)
2.0% of total GDP (down 0.2 percentage points since 2022)	7.0% of total employment (up 0.2 percentage points since 2023)	19.5% of total service exports (up 0.1 percentage points since 2023)

National tourism strategy: Tourism Development Strategy of the Republic of Serbia for the period 2026–2030

Responsible government agency: Ministry of Tourism and Youth

National tourism budget: RSD 4.8 billion (2025)

Key tourism policy priorities and actions:

- *Developing a long-term integrated strategy* – Working to develop the new Tourism Development Strategy of the Republic of Serbia for the period 2026–2030 which is in its final phase of preparation.
- *Shifting to sustainable models of tourism* – Implementing the sustainable tourism development criteria for destinations across three pilot destinations.
- *Supporting rural tourism* – Providing financial incentives to improve the quality of accommodation and opportunities for self-employment in tourism in rural areas.

Tourism in the economy and outlook

Tourism is an important contributor to the economy in Serbia. In 2024, accommodation services directly contributed RSD 43.9 billion to the Serbian economy or 0.5% of total GDP. The Statistical Office of Serbia recorded approximately 165 000 jobs within tourism-related industries, which represents 7.0% of total employment in 2024. This is an increase of 2.6%, or 4 200 tourism jobs, compared to 2023.

In 2024, Serbia registered 2.4 million international tourist arrivals at official accommodation establishments. This represents an increase of 11.7% compared to the year 2023. The top three source markets were Türkiye (10%), Bosnia and Herzegovina (7%) and the People's Republic of China (7%). International tourist arrivals at official accommodation establishments decreased by 1.5% in 2025. Foreign exchange income from tourism in 2024 was EUR 2.5 billion, 9% higher than in 2023.

Domestic tourism is essential for the tourism sector in Serbia, with 2.0 million overnight domestic tourists recorded at official accommodation establishments in 2024. This was 0.5% below the level in 2023, but it still amounted to 45% of all overnight tourists at official accommodation establishments in 2024.

Tourism governance

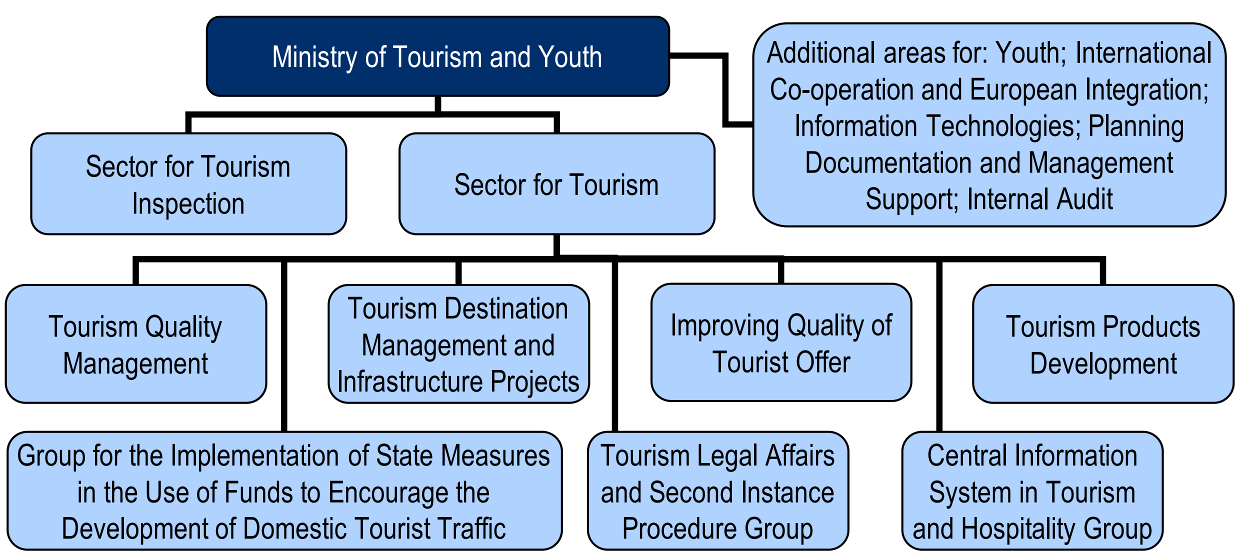
The Ministry of Tourism and Youth is responsible for tourism affairs, including all aspects of tourism strategy, policy, promotion, and development. The Ministry provides direct and indirect support to regional and local authorities, including incentive programmes for tourism development projects such as infrastructure, promotion, education, and training, and supporting local governments and regional development agencies with jointly funded projects.

The Ministry co-operates closely with other ministries, particularly the Ministry of Culture on international bilateral co-operation and the development of cultural routes, the Ministry of Agriculture on the development of rural tourism and the support instruments in the field of rural development, the Ministry of Environmental Protection on sustainable tourism development, as well as the Ministry of Health, and the Ministry of European integration. The Ministry works closely with the private sector and is active in regional initiatives and programmes and projects from international organisations.

The Tourist Organisation of Serbia carries out promotional activities internationally. Regional and local tourist organisations are closely integrated into promotional activities. The Provincial Secretariat for Economy and Tourism in the Autonomous Province of Vojvodina is responsible for managing tourism development, in accordance with the Tourism Development Strategy and the Law on Tourism of the Republic of Serbia.

In 2025, the total budget allocated for tourism and tourism inspection amounted to RSD 4.8 billion. The portion of the budget dedicated solely to tourism was RSD 4.5 billion, of which RSD 2.7 billion was set aside for infrastructure and capital investments. RSD 170 million was allocated for projects related to promotion, education, and training in the tourism sector. The National Tourism Organisation of Serbia received a budget allocation of RSD 500 million.

Serbia: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Tourism and Youth, 2026.

Tourism policies and programmes

Serbian tourism is guided by the Tourism Development Strategy 2016-2025, with the new Tourism Development Strategy of the Republic of Serbia for the period 2026–2030 in its final phase of preparation.

The adoption of the new Strategy is expected by mid-2026. Some of the key priorities for the Strategy include strengthening the tourism value chain and encouraging inter-sectoral, inter-ministerial, regional, and international co-operation. To achieve this, the Strategy will align the goals of tourism with national strategic goals in the areas of spatial development, transportation, construction, agriculture, culture, and digitalisation. The Tourism Development Strategy is complemented by the Strategic Marketing Plan for Tourism of the Republic of Serbia until 2025, which is also in the process of being updated for the period 2026-2030.

To improve the tourism workforce, Serbia has developed the Tourism Workforce Skills Strategy in co-operation with the Serbian Employers' Union and the International Labour Organization (ILO). The Strategy aims to help Serbia’s tourism sector identify capacity gaps, forecast skills needs and prioritise actions to develop human resources that will drive the sector’s growth. The Tourism Workforce Skills Strategy will focus on quantitative and qualitative improvement of education in tourism to bridge the gap between curricula in higher education institutions and essential informal education and training, which is required for both employed and unemployed individuals in tourism. Special attention is being paid to retraining the workforce at the local level in all occupations within tourism and hospitality.

To strengthen the tourism value chain and increase the competitiveness of Serbia’s tourism offer, Serbia continues to finance capital investment projects, infrastructure development, and tourism development and promotion projects using budgetary funds. Over the past two years, a portion of the tourism budget has been allocated specifically to support the development of rural tourism, including the equipping of rural accommodation facilities (privately-owned rural tourism households, such as homeshares and private homestays). These efforts contribute to entrepreneurship and self-employment in rural areas. These efforts have also been supported across three Ministries, the Ministry of Tourism, the Ministry of Agriculture, and the Ministry for Rural Development, in conjunction with local governments, and adhere to the ‘Regulation on Incentive Funds for the Development and Improvement of Rural Tourism and Hospitality’. In line with sustainable development goals, the government has also adopted a ‘Regulation on the conditions, procedure for allocation, and use of incentive funds’ specifically targeting the development and enhancement of rural tourism and hospitality across Serbia.

Sustainable economic, environmental and social development of tourism in the Republic of Serbia has been a long-term priority. It has been a core goal for the Tourism Development Strategy 2016-2025 and will continue to be a priority for the new Tourism Development Strategy 2026-2030. Serbia is currently working on the implementation of the Global Sustainable Tourism Council Destination Criteria (GSTC-D) in three pilot destinations, with support from the Japan International Cooperation Agency (JICA) (see box below). These destination management practices emphasise environmental conservation, cultural heritage protection, and community involvement. They also promote digitalisation in tourism in terms of presenting and promoting the tourism offer to the local population and tourists.

International collaboration for sustainable tourism development in Serbia

Serbia's tourism sector faces challenges to manage environmental impact and ensure sustainable growth. As a member of the Global Sustainable Tourism Council (GSTC), Serbia is actively working on implementing GSTC criteria for sustainable destination management in co-operation with the Japan International Cooperation Agency (JICA). The Ministry of Tourism and Youth plays an active role in this process, working closely with JICA to prepare destinations for certification by the official GSTC body.

This initiative includes the development of sustainable management practices and alignment with international standards to ensure long-term environmental, social, and economic benefits from tourism. In the first phase, five destinations were selected, which was then narrowed to three destinations that will receive tailored support. The pilot destinations, Pirot, Prijepolje, and Senta, were selected based on the initial criteria of having a tourism development programme, partial fulfilment of GSTC-D standards, and border locations. Field assessments and structured evaluations were conducted to review each destination's baseline alignment with GSTC-D criteria.

These destinations will start implementing GSTC standards, to work towards more balanced tourism growth that respects environmental and social sustainability, while local stakeholders will improve their capacity for sustainable tourism management. The estimated duration of the project is two years.

The collaboration with JICA provides expert and financial support, including the deployment of an expert who is assisting Serbia's destinations to meet global sustainability benchmarks and improve competitiveness.

Serbia - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/i1hg87

South Africa

South Africa: Key tourism messages 2026

Tourism direct GDP (2024)	Tourism direct employment (2024)	Travel exports (2024)
4.9% of total GDP (up 0.5 percentage points since 2023)	5.7% of total employment (up 1.0 percentage points since 2023)	39.5% of total service exports (up 0.3 percentage points since 2023)

National tourism strategy: National Tourism Sector Strategy 2016-26

Responsible government agency: National Department of Tourism

National tourism budget: ZAR 2.4 billion (2024-25)

Key tourism policy priorities and actions:

- *Improving access for tourists* – Improving access for visitors in relation to immigration and transport connectivity, including through the Trusted Tour Operator Scheme.
- *Preparing the tourism sector for future crises* – Developing and regularly reviewing the scenario-based Tourism Crisis Management Framework to enable South Africa to respond and manage crises.
- *Creating a safer tourism* – Implementing the research-based tourism safety programme in collaboration with law enforcement agencies.

Tourism in the economy and outlook

Tourism plays a significant role in the South African economy and remains a priority sector to respond to socio-economic challenges in the country. In 2024, tourism directly contributed an estimated ZAR 361.7 billion and 954 000 jobs to the South African economy, accounting for 4.9% of GDP and 5.7% of the total workforce.

International tourist arrivals totalled 8.9 million in 2024. While this represented a 5.1% increase compared to 2023, it remains almost 13% below 2019 levels. The top three source markets in terms of international arrivals were Zimbabwe (24.5%), Mozambique (17.8%) and Lesotho (10.9%). Inbound tourism expenditure in 2024 reached ZAR 113.9 billion, up 12.2% from 2023 (ZAR 101.5 billion), but still down on the peak of ZAR 121.5 billion in 2019.

South Africa's domestic tourism continues to play an important role in the country's economic rebound, with a peak of 40.2 million domestic tourists in 2024, 6.1% above 2023 levels. Total domestic tourism expenditure (including same-day expenditure) was ZAR 136.4 billion in 2024, 12.4% higher than in 2023.

Tourism governance

Tourism continues to be a concurrent function in South Africa's supreme law, the Constitution (1996), with all three spheres of government (national, provincial and local) having jurisdiction and direct responsibility in developing and implementing tourism policy.

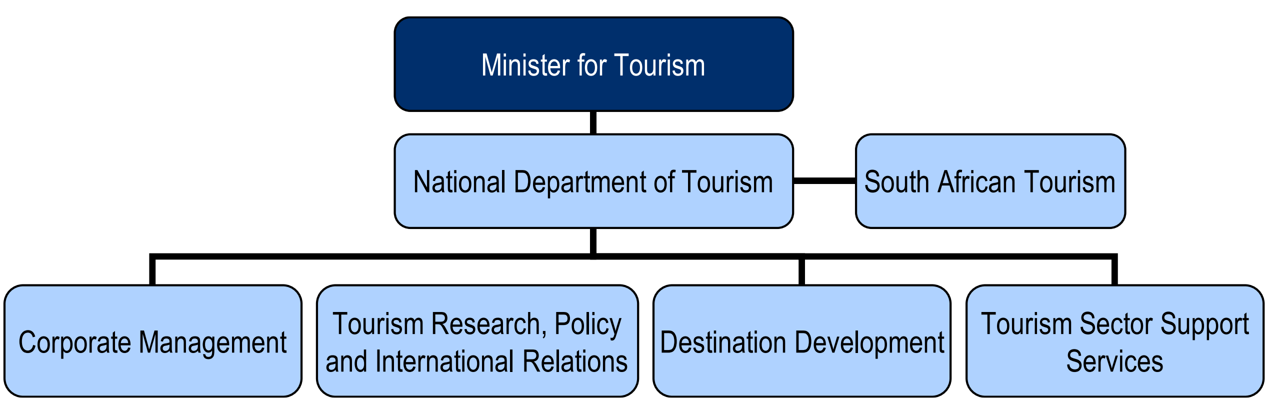
The Minister for Tourism is the executive authority for national tourism policy and development in South Africa. The Minister oversees South African Tourism, the national public entity responsible for marketing South Africa nationally, regionally and internationally, and the Department of Tourism, responsible for promoting the inclusive growth of tourism through research, policy, destination development, international relations and sector support services. The National Tourism Stakeholder Forum and Tourism Leadership Dialogue provide engagement platforms for the co-ordination and integration of activities with public and private sector stakeholders. Horizontal co-ordination is pursued through bilateral engagement and co-operation with key ministries on areas such as visa policy, air connectivity, licensing and tourism safety.

The Department of Tourism participates in international engagements, multi-lateral organisations, and in bilateral relations through signed memoranda of understanding with key countries in Africa, the Middle East and the rest of the world.

Provincial and local governments have responsibility for regional tourism development. At the provincial level, a Member of the Executive Council in each of South Africa's nine provinces is responsible for tourism. The Minister of Tourism and the Executive Councils co-ordinate and align policy, strategic performance plans, priorities, and objectives, through the Minister-Members of the Executive Council (MINMEC) inter-governmental forum. At the local level, a municipality led by the Member of Mayoral Committee responsible for local economic development is responsible for tourism development. The Tourism Business Council of South Africa plays an active role in tourism policy advocacy and takes part in the National Tourism Stakeholder Forum where government priorities are advanced.

The total allocated budget for 2024-25 is ZAR 2.4 billion, which represents a 5.7% decrease compared to 2023-24 financial year. In 2024-25, corporate management was allocated ZAR 359.4 million; tourism research, policy and international relations (including South African Tourism, the Department of Tourism's only entity) were allocated ZAR 1.3 billion; destination development, ZAR 367.8 million; and tourism sector support services, ZAR 318.1 million.

South Africa: Organisational chart of tourism bodies



Source: OECD, adapted from the Department of Tourism, 2026.

Tourism policies and programmes

Tourism development and growth in South Africa is guided by the National Tourism Sector Strategy 2016-2026, which aims to promote rapid and inclusive tourism development, focusing on South Africa's competitive edge in nature, culture, and heritage, and underpinned by *Ubuntu* and supported by innovation and service excellence. This is supported by the Tourism Sector Master Plan, which adjusted the Tourism Sector Recovery Plan timeframes and seeks to continue to monitor the implementation of strategic interventions until 2026. Furthermore, in its latest five-year Tourism Growth Partnership Plan (2025-2030), South Africa prioritises the positioning of tourism as a key driver of inclusive economic growth and job creation.

Improving access to South Africa for visitors in relation to immigration and transport connectivity entails working collaboratively with immigration and transport authorities to remove regulatory barriers. Over the last two years, progress has included the implementation of the Trusted Tour Operator Scheme, an initiative designed to expedite group visa applications for the Chinese and Indian tourism markets. The scheme replaces the manual, paper-based processes that required prospective tourists to apply for a visa in-person, by having Tour Operators upload applications through an online system and assume responsibility for the tourists they bring to the country. Under the Trusted Tour Operator Scheme, tourist visas are processed and receive digital outcomes, on average, within 24 hours. In 2025, 110 operators were approved to implement the scheme in China and India. The broader visa regime is currently shifting towards Electronic Travel Authorisation, which will cover many more visitors. The private sector also plays an instrumental role in policy advocacy when it comes to access issues.

Preparedness is crucial to help mitigate the impact of future crises. South Africa has developed a scenario-based Tourism Crisis Management Strategy, approved in May 2024, to enable South Africa to respond and manage future crises. The strategy seeks to identify and engage relevant structures for disaster management in the country and ensure tourism participation in these structures. The intention is to regularly review this strategy to ensure it remains relevant.

South Africa is also working to ensure the safety of tourists. The implementation of the research-based tourism safety programme, in collaboration with law enforcement agencies, is ongoing. To formalise the relationship between the Department of Tourism and law enforcement authorities, particularly the South African Police Services, a five-year Memorandum of Understanding was entered into in December 2019, committing both the tourism and law enforcement authorities to focus on crime and criminal activities targeting tourists and visitors in identified hotspots. A review of the existing Memorandum of Understanding is underway and is planned for completion by end March 2026.

A 2024 review of the overarching policy guiding the tourism sector found the South African Tourism sector was not shifting to recommit to the responsible tourism agenda. A key outcome of the resulting Tourism White Paper (see box below) was the discouragement of unsustainable conservation practices. Other initiatives to contribute to the responsible tourism agenda in South Africa include universal accessibility initiatives for state-owned tourism products and the implementation of energy efficient initiatives through government subsidies.

In December 2024, South Africa assumed the G20 Presidency, marking the first time an African nation had held the G20 Presidency. The G20 South African Presidency theme was 'Solidarity, Equality and Sustainability'. The Tourism Working Group priorities for the G20 in 2025 included people-centred AI and innovation for startups and MSMEs; tourism financing and investment; air connectivity for seamless travel; and enhanced resilience for inclusive, sustainable tourism development.

Reviewing tourism policy in South Africa

The tourism sector in South Africa has, in the past, underperformed relative to its potential. This could be attributed to various challenges such as regulatory and administrative barriers to tourism growth, a perception of the country as unsafe for visitors, or an inability to comprehensively respond to crises and tourism policy not responding to current trends. In response, South Africa reviewed the overarching policy guiding the tourism sector, with Cabinet approving a Tourism White Paper in September 2024. The White Paper was published and approved for implementation by the Minister for Tourism in October 2024. Some of the major policy interventions to be tackled by the government and private sector included:

- Creating an enabling regulatory environment by establishing a differentiated system of regulation for short term rentals and a framework for reporting.
- Improving the ease of access for visitors regarding immigration and air access.
- Recommitting to the responsible tourism agenda and sustainable development goals.
- A focus on enterprise and supplier development as a critical lever for transformation in the tourism sector.
- Investment in rural and peri-urban routes of high tourism potential.

The review is considered an historical achievement for South Africa as the tourism sector was previously governed by the 1996 Tourism White Paper. A key lesson learned in the review process was the importance of including tourism stakeholders at the beginning of the policy review process to contribute towards policy areas requiring attention to ensure support throughout the process. The appointment of a diverse Panel of Experts also helped to drive the policy review process at a national level, while providing technical support and enhancing policy outcomes.

South Africa - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/ciywng

Thailand

Thailand: Key tourism messages 2026

Tourism direct GDP (2024)	Tourism direct employment (2024)	Travel exports (2024)
5.5% of total GDP (no historic data)	12% of total employment (no historic data)	58.8% of total service exports (up 5.7 percentage points since 2023)

National tourism strategy: 3rd National Tourism Development Plan (2023-2027)

Responsible government agency: Ministry of Tourism and Sports

National tourism budget: THB 12.0 billion (2024)

Key tourism policy priorities and actions:

- *Creating a more resilient tourism model* – Building supply-side resilience and equitably decentralising revenue to buffer the sector against external global shocks and domestic economic imbalances.
- *Improving the quality of the tourism offer* – Elevating digital infrastructure, implementing AI-driven data systems through the 'One-Stop Tourism Database' and adhering to global safety standards to resolve fragmented management issues.
- *Shifting to a sustainable tourism model focused on visitor experiences* – Shifting to high-potential, value-based tourism while enforcing strict carrying capacity models and integrating climate adaptation strategies to halt environmental degradation and build systemic resilience.

Tourism in the economy and outlook

Tourism remains a major economic pillar for Thailand, significantly contributing to GDP, employment and regional livelihoods. In 2024, Thailand welcomed 35.5 million international tourists, an increase of 26.3% compared to 2023. Despite the strong increase, international overnight visitors remained below the record high of 39.9 million in 2019. The top international markets in in 2024 were People's Republic of China, (18.9% of international tourists), Malaysia (13.9%) and India (6.0%).

Domestic tourism remains a driver of tourism in Thailand. In 2024, there were a record 131.6 million domestic overnight visitors, an increase of 4.8% compared to 2023.

Tourism governance

Tourism in Thailand is led by the Ministry of Tourism and Sports, which is responsible for national tourism policy formulation, strategic planning and inter-agency co-ordination. Policy development is supported through structured inter-ministerial co-ordination with agencies responsible for transport, environment, public health, digital economy and disaster risk management. Co-ordination is also supported through inter-agency committees, destination-based co-ordination mechanisms and regular public–private dialogue.

Key public bodies under the Ministry of Tourism and Sports include:

- Department of Tourism - responsible for tourism standards, licensing and regulatory oversight.
- Tourism Authority of Thailand - responsible for tourism marketing and promotion and with the aim of driving Thailand towards meaningful and sustainable tourism.
- Designated Areas for Sustainable Tourism Administration - responsible for area-based development and the promotion of sustainable tourism in designated areas.

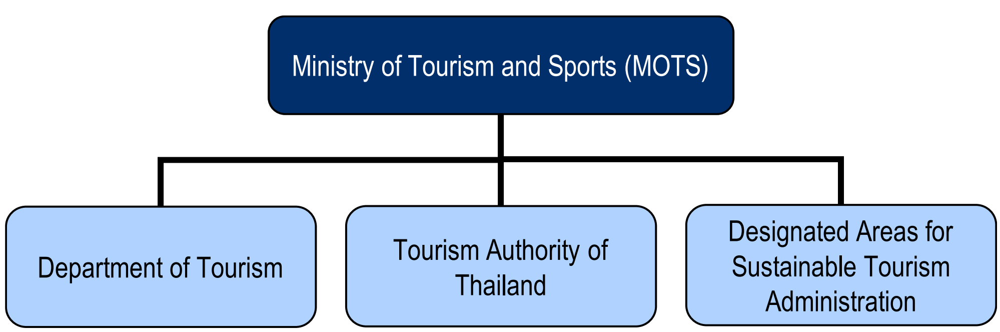
The National Tourism Policy Committee of Thailand serves as the primary mechanism to supervise tourism development in alignment with the National Tourism Development Plan. It is responsible for i) formulating, determining, and issuing national tourism policies, ii) supervising and driving the implementation of the national tourism development framework, iii) action plans for tourism development, particularly in special tourism development zones or areas, and iv) providing approvals, oversight, and co-ordination for operations and projects within designated tourism development areas.

The Tourism Council of Thailand serves as the central private sector organisation for tourism, uniting tourism associations of all branches from across the country into a single network.

Regional and local authorities play a key role in destination management, local infrastructure, safety and security, and community-based tourism development through a decentralised implementation structure. They are also responsible for preparedness and response to destination-specific risks, including extreme heat, flooding and other climate-related hazards.

The tourism budget in 2024 was approximately THB 12.0 billion.

Thailand: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Tourism and Sports, 2026.

Tourism policies and programmes

Tourism in Thailand is guided by the 3rd National Tourism Development Plan (2023-2027). The strategic framework is anchored in the concept of "Building Forward a Better Tourism for All", operationalised through the “triple bottom line” approach:

- People (social impact): improving safety and quality standards, integrating transport connectivity, human capital development, and establishing a centralised tourism database to support evidence-based policy.

- Profits (economic impact): transitioning to a high-value tourism ecosystem through diversified and higher-quality markets, modernised marketing, reduced revenue leakage, decentralised regional benefits and strengthened supply chains.
- Planet (environmental and cultural impact): protecting natural and cultural assets, including the use of technology and data for carrying-capacity management.

The National Tourism Development Plan is implemented through a holistic and integrated framework consisting of four core strategic pillars: resilient tourism, quality tourism, tourism experience, and sustainable tourism. It aligns with the Tourism Master Plan under the 20 Year National Strategy, which aims to utilise the tourism sector as a strategic tool to reduce inequality in Thai society.

Thailand has introduced a new ‘Equitable Tourism’ policy approach which aims to better spread the benefits of tourism across Thailand (see box below). For example, the ‘Half-Half Thai Tourism Co-payment Scheme’, was introduced in 2025 to help spread the benefits of tourism and improve destination management. The scheme provided 500 000 accommodation vouchers to residents to subsidise up to THB 3 000 per room/night with THB 500 in e-coupons, to be distributed across accommodation, tourist attractions, restaurants, shops, spas, and vehicle/ boat rentals. To balance demand from congested hubs to less established areas, 300 000 vouchers were provided for 22 ‘Main Cities’ which enforce peak-day yield control (reducing subsidies to 40% on weekends), while the 200 000 quotas for 55 ‘Secondary Cities’ offer a flat 50% subsidy regardless of the day. More than 3 000 tourism operators participated in the project, which generated a total revenue of THB 35.0 billion.

Creating more equitable tourism in Thailand

Thailand has introduced a new Equitable Tourism policy approach, aimed at redistributing tourism benefits more evenly across the country and strengthening domestic tourism value chains to support local value creation and community development. These issues are being addressed through an integrated package of measures, including:

- Community-based tourism development - enabling local communities to design and manage tourism products based on local identity and resources, including pilot initiatives that create value from local assets.
- Targeted marketing and incentive schemes - stimulating travel to secondary destinations and promoting weekday travel to spread the benefits of tourism and reduce pressure on major destinations.
- Development of a Thai online travel agency platform - retaining tourism revenue within the domestic economy and strengthening the market position of local tourism operators.
- Regulatory reforms - systematically reviewing and removing outdated or restrictive regulations that hinder investment and tourism business development in secondary destinations.

Progress in delivering these measures will be monitored through specific indicators including the share of total tourism revenue generated in targeted secondary destinations, the proportion of total visitor numbers travelling to secondary destinations, and average visitor expenditure. These indicators will be used to identify reductions in regional disparities and improvements in local economic value creation.

In 2024, the Thailand Digital Arrival Card System was introduced to shift from paper-based border controls to a fully digitised, proactive immigration framework. The System promotes seamless travel by replacing manual paperwork with comprehensive pre-arrival digital data entry to remove bottlenecks at physical entry points. It also improves security through automated, intelligence-driven pre-screening and establishes a real-time, centralised database of inbound traveller flows and demographic profiles.

This complemented the launch of a new one-stop ‘Entry Thailand’ portal for tourists in October 2024. The portal brings together information related to visas, tax refunds, reservations for national parks and attractions, train ticketing and timetabling, as well as links to safety-related applications, including for public disaster alerts and the Thailand Police.

Thailand - Statistical profile

Domestic, inbound and outbound
Enterprises and employment
Internal consumption

StatLink https://stat.link/2p7z6v

OECD Tourism Trends and Policies 2026

The 2026 edition of *OECD Tourism Trends and Policies* analyses tourism performance and policy developments across 53 OECD and partner countries. It explores how governments are adapting policy action to strengthen resilience and deliver more balanced economic, social, and environmental outcomes in an uncertain and changing landscape. The report emphasises the need for flexible, co-ordinated policy approaches to put tourism on a more sustainable, resilient and competitive path, and presents data and evidence on the scale, structure and significance of the tourism economy. Tourism policy priorities and reforms are analysed, and examples of country practices highlighted. Thematic chapters provide insights on enhancing the social benefits of tourism and strengthening the sector's capacity to adapt to extreme weather-related events.

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