

Committee on Tourism and Competitiveness (CTC)
18th MEETING**Tuesday 20 January 2026 from 15:00 to 17:00 hrs. (CET time), UN Tourism HQ****MINUTES**

The **18th Meeting of the Committee on Tourism & Competitiveness (CTC)** was held in hybrid format on Tuesday 20 January 2026 at UN Tourism Headquarters in Madrid, Spain.

This was the fifth meeting of the CTC in its current composition (2023-2027).

The relevant documents are attached for information: **i)** Agenda of the Meeting (**Annex I**); **ii)** List of Participants (**Annex II**); **iii)** Presentation on the progress of the 'World Tourism Report' (**Annex III**); **iv)** Presentation on the Programme of Work 2026-2027 (**Annex IV**); **v)** List of Members of the CTC (2023-2027) (**Annex V**); **vi)** Official group photo (**Annex VI**).

Item 1. Welcome remarks by the Chair (Kenya)

1. **The Chair (Kenya)** opened the meeting, welcomed participants and invited members of the Committee to introduce themselves (both those participating in person and online).
2. Participating members of the CTC included **Kenya, Malta, Sri Lanka, Thailand, Uruguay, Lebanon** (online), **Republic of Moldova** (online), **Zambia** (online) as well as **NECSTour**, representative of Affiliate Members and **Flanders**, representative of Associate Members (online).
3. The Secretariat confirmed quorum to hold the meeting (even if only the in-person participating countries were considered).
4. The **Chair** noted that it was an honour for **Kenya** to chair the meeting and thanked participants for attending at UN Tourism Headquarters in Madrid and online. He acknowledged the UN Tourism Secretariat, in particular Ms. Sandra Carvao, Director of Market Intelligence, Policies and Competitiveness, for its preparatory work. The **Chair** underlined the renewed momentum of global tourism and emphasized that competitiveness should be understood in terms of resilience, data use, innovation, governance, and benefits for communities. The **Chair** also highlighted the relevance of the World Tourism Report to the mandate of the Committee and invited members to engage in focused and forward-looking discussions on the programme of work 2026-2027.



Item 2. Welcome remarks by Ms. Sandra Carvao, Director, Market Intelligence, Policies and Competitiveness, UN Tourism and item 4. Presentation on the progress of the “World Tourism Report” by Ms. Sandra Carvao, Market Intelligence, Policies and Competitiveness, UN Tourism (both items were presented together)

5. **Ms. Carvao** thanked the participants who joined in person and those online.
6. **Ms. Carvao** briefed the Committee on the latest developments related to the World Tourism Report and recalled that the report is a flagship initiative of UN Tourism, an ambitious exercise combining analysis of tourism policies and national planning with data-based assessment of sector performance across economic, social, environmental, and governance dimensions.
7. **Ms. Carvao** explained that the report is structured around three areas: analysis of policy enablers and performance at global, regional, and country levels; a foresight chapter examining long-term scenarios; and a thematic chapter focused on governance. The report is being developed through a consultative process involving all relevant UN Tourism departments, technical committees, , and a group of multidisciplinary experts (Advisory Panel).
8. During her presentation, **Ms. Carvao** reported that criteria and indicators for policy and performance assessment had been identified and validated by the Committees, and that a self-assessment tool comprising 140 indicators had been completed by 45 countries. It was clarified that self-assessment data would be used only for aggregated global analysis and would not be published at country level. In parallel, the Secretariat had analysed more than 100 National Tourism Strategies to complement the policy review. Work was ongoing to map performance indicators and assess data availability and comparability. The Foresight chapter, based on regional and global consultations involving approximately 100 countries, was reported to be nearly finalised, with technology and climate change identified as key areas drivers of change due to their high levels of uncertainty and impact in the future of the sector. The Thematic chapter on Smart Governance had been shared with members of the CTC for comments, with a deadline communicated by the Secretariat.
9. **Ms. Carvao** indicated that publication of the report was planned for mid-year, with finalisation expected by the end of the first quarter. Furthermore, she informed that the objective in the future is to transform the self-assessment tool into an online tool for each of the Members to use for their own assessment and planning purposes.
10. Following Ms. Carvao's presentation, the **Chair** opened the floor for discussion on the progress of the World Tourism Report.
11. **Malta** congratulated the Secretariat for the progress in this important initiative and highlighted the quality and usefulness of the report while also indicated that it would inform their ongoing national tourism strategy review. **Malta** also raised concerns regarding continued growth in global tourism demand, the widening gap between destinations with differing levels of tourism pressure, and the need to consider these dynamics when applying the report's approaches. The importance of

developing practical tools and moving beyond traditional performance metrics – focused on measuring performance and growth in terms of the number of tourists arrivals - was also emphasized.

12. **NECSTour** expressed support for the report and identified areas where they could contribute, including data harmonisation, climate action, and governance. **NECSTour** underlined the role of public-private cooperation - and beyond public-private-residents' partnerships - and stressed the need to include residents in governance frameworks.
13. **Sri Lanka** (Vice-chair) addressed resilience, including infrastructure resilience, and the relevance of the report for national tourism development planning.
14. **Republic of Moldova** added that the World Tourism Report is a call for action and it will be very useful tool in terms of governance, coordination across government institutions, and integration of tourism into broader policy agendas.
15. The **Chair** summarised the discussion, noting the emphasis placed by members on sustainable policy approaches, governance, resilience, data, and practical implementation. **Kenya** thanked participants for their contributions and closed the discussion on the World Tourism Report.

Item 3. Adoption of the agenda

16. The Committee unanimously adopted the provisional agenda of the meeting as circulated on circulated on 9 January this year.

Item 5. Presentation on the Programme of Work 2026-2027

17. **Ms. Carvao** presented the Programme of Work for 2026–2027 and recalled that it had been approved by the General Assembly and that guidance from the Committee was sought on priorities and areas for engagement, given resource constraints.
18. **Ms. Carvao** presented the results of a survey of Member States, indicating preferred activities and regional variations in priorities. Rural tourism and Best Tourism Villages, Market Intelligence, as well as technical events (gastronomy tourism, etc.) were identified among the most valued activities. Key priority areas cited included product development and diversification, human capital development, infrastructure, environmental sustainability, innovation and digitalisation, with variations across regions.
19. **Ms. Carvao** outlined the main areas of work under the Market Intelligence, Policies and Competitiveness Department, including enhancement of the UN Tourism data dashboard, expanded use of big data through partnerships, exploration of a new long-term tourism demand forecast, organisation of a global event on trends, development of communities of practice on

market intelligence, and continued support to Member States in strengthening their market intelligence systems.

20. In her presentation, **Ms. Carvao** outlined objectives and planned activities across policy and governance, destination management, product development, market intelligence, and tourism for rural development, with several initiatives noted as dependent on the availability of extra-budgetary funding.
21. On policy and governance, **Ms. Carvao** highlighted planned work on long-term tourism forecasting, including tourism towards 2050, and the intention to develop a second edition of the World Tourism Report in 2028 following the release of the 2026 edition, subject to availability of extra-budgetary funds. Members were informed of plans to launch an online self-assessment tool based on agreed criteria and indicators to support national assessments.
22. **Ms. Carvao** also reported ongoing work on short-term rentals, including the preparation of a survey to be circulated to all Member States to map national-level policies and approaches, with the objective of consolidating information in a publicly accessible dashboard. Tourism management and the challenge of managing growth were identified as increasing concerns, and in this sense proposed the establishment of a community of practice among Member States, with a view to sharing experiences and contributing to a future policy paper.
23. On destination management, **Ms. Carvao** presented the proposed “Destination Net +”, an initiative aimed at supporting local destination management organizations through guidance, self-evaluation tools, and the sharing of good practices. In the area of product development, ongoing work on gastronomy and wine tourism was noted, as well as research on the impacts of climate change on snow and mountain destinations while Members were invited to relevant forthcoming activities, including meetings related to mountain tourism.
24. Urban tourism was also addressed, with reference to plans to revitalize the Mayors’ Forum on Sustainable Urban Tourism and to explore mechanisms for highlighting cities demonstrating leadership in sustainable tourism management. **Ms. Carvao** further outlined an initiative to recognize destinations excelling in specific thematic areas such as health tourism, meeting industry and gastronomy, based on defined criteria rather than certification.
25. **Ms. Carvao** reported that the Tourism for Rural Development Programme would continue, with plans to open the Best Tourism Villages by UN Tourism 2026 edition and to convene a second global conference on tourism and rural development, following the first conference held in Viet Nam in 2024. The collection and dissemination of good practices from existing Best Tourism Villages were also noted.

Item 6. Discussion on the priorities for the work plan for the CTC 2026-2027

26. The Committee on Tourism and Competitiveness considered the proposed programme of work for the period 2026–2027 as presented by the Secretariat and the **Chair** invited the participants to take the floor and guide the work of the Secretariat on the proposed initiatives.
27. Members welcomed the proposed programme of work and its comprehensive scope and widely emphasized the importance of recognizing destinations that excel in specific tourism segments and supporting peer learning among Member States.
28. **Thailand** addressed sport tourism and **Ms. Carvao** clarified that this area is under the Affiliate Members Department, in coordination with other departments.
29. **Kenya** raised the issue of tourism carrying capacity, with a request for guidance on parameters and methodologies to balance sustainability and visitation. Regarding this particular point, **Ms. Carvao** explained that it had been discussed internally and agreed that now the moment has come to address it and help Member States although she also added that it is a complex task given its multiple dimensions (economic, social and environmental) and given that the concept and its boundaries have further implications (i.e. defining the territory to which it applies, local, regional, etc.)
30. **Malta** highlighted domestic tourism as a priority, noting its scale - with an estimate 10-15% Malta's tourism share -, resilience role, and the need for improved measurement and integration into tourism statistics. In this sense, **Ms. Carvao** expressed that the Secretariat would take note and added that during the COVID-19 pandemic and as part of the efforts by the Secretariat during the crisis, UN Tourism had already conducted research on the topic which resulted in a briefing paper led by Market Intelligence, Policies and Competitiveness which was published in 2020¹.
31. **Republic of Moldova** highlighted the need of facilitating more dialogue and collaboration among sectors, which is key given the cross-cutting nature of tourism, and added the importance of governance and destination management. **Republic of Moldova** also mentioned the role of Artificial Intelligence (AI) and shared that in their case the topic had been moved from the Ministry of Culture to the Ministry of Economy and added on their priority to enhance service quality as well as to stimulate local and foreign investment in their tourism sector.
32. **Ms. Carvao** thanked members for their contributions and indicated that the discussions would help prioritize activities within the 2026–2027 work plan and identified tourism carrying capacity and domestic tourism as areas requiring further work and attention.
33. The **Chair** thanked the members for their intervention and **Ms. Carvao** for addressing their comments and remarks.

¹¹ World Tourism Organization (2020), *UNWTO Briefing Note – Tourism and COVID-19, Issue 3. Understanding Domestic Tourism and Seizing its Opportunities*, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284422111>

Item 7. Other issues

34. The **Chair** gave the floor to the members for other issues.
35. **Sri Lanka** shared that in contrast to the traditional top-down policy approach, they had adopted a bottom-up approach in tourism development that involves local communities in decision making and has proved to be very useful as it creates a deeper sense of ownership.
36. **Thailand** mentioned emerging requirements affecting tourism businesses, including due diligence and data-related obligations and a Directive by the European Union on the subject which would be in place in 2027 and was an important concern for them.
37. Further discussion covered regulatory challenges related to short-term rentals, which was raised by **Republic of Moldova**.
38. **Malta** also noted that the market goes faster than the public sector when it comes to regulation and by when regulatory frameworks are in place the market has evolved, which should make all reflect on the need to put less hope in regulation. Additionally, Malta mentioned that tourism cannot operate in silos as it affects and is affected by other sectors and market dynamics (i.e. housing, immigration, etc.)
39. **Flanders** shared their example on regulations, explaining that they had been pioneers in the registration of STR and could share their good practice with the Secretariat so it could be shared with other members. Flanders also highlighted their interest in gastronomy tourism and recalled that they hosted the 6th UNWTO World Forum on Gastronomy Tourism in 2021.²
40. **Ms. Carvao** indicated that the Secretariat would take note of these issues, gather further information, and share relevant findings with the Committee, while encouraging members from different regions to share their experience regarding regulation, registration systems, and the balance between regulation and industry dynamics.

Item 8. Closing remarks by Ms. Sandra Carvao, Market Intelligence, Policies and Competitiveness, UN Tourism

41. **Ms. Carvao** informed the Committee of the recent publication of the January 2026 issue of the World Tourism Barometer and acknowledged the contribution of the whole team at the Market Intelligence, Policies and Competitiveness Department to the Committee's work.
42. **Ms. Carvao** thanked the members of the CTC participating in the meeting for their invaluable contributions to the meeting and congratulated the Chairman for his excellent role during the

² 6th UNWTO World Forum on Gastronomy Tourism, 31 October - 2 November 2021, Bruges, Belgium.
<https://www.untourism.int/6th-unwto-world-forum-on-gastronomy-tourism>

meeting, while highlighting that this was one of the most productive meetings of the Committee in the past years.

Item 9. Closing remarks by the Chair (Kenya)

- 43.** In his concluding remarks, the **Chair** thanked the Secretariat and members of the CTC for the substantive and participatory discussion and noted that the inputs and priorities identified would guide the implementation of the Committee's work plan and encouraged members to remain actively engaged.
 - 44.** The **Chair** invited members participating in person to meet at the lobby in UN Tourism HQ for an official group photograph.
 - 45.** The **Chair** concluded the meeting.
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