

The Travel & Tourism Competitiveness Index 2008: Measuring Key Elements Driving the Sector's Development

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The World Economic Forum has embarked on a multi-year effort to understand and measure the Travel & Tourism (T&T) competitiveness of nations around the world. This chapter presents the second edition of the Travel & Tourism Competitiveness Index (TTCI), launched for the first time last year.

Our interest in benchmarking T&T competitiveness stems from its economic importance. According to the World Tourism Organization (UNWTO), global tourism hit a new record in 2006, with 842 million arrivals—up by 4.5 percent from 2005,¹ and generating tourism receipts of US\$682.7 billion—and it is expected to grow briskly in the coming decade.² The World Travel & Tourism Council (WTTC) estimates that, from direct and indirect activities combined, the T&T sector now accounts for 10.4 percent of global GDP, 12.2 percent of world exports, and 9.5 percent of world investment. In addition, the T&T industry in 2007 generated in excess of US\$7 trillion in revenues—a figure that is expected to rise to over US\$13 trillion over the coming decade.³

Considering the strong global economic value of the industry, its importance for many countries is not surprising. A growing national T&T sector contributes to employment, raises national income, and can improve the balance of payments. In this context, the sector is an important driver of growth and prosperity and, particularly within developing countries, it can also play a role in poverty reduction.

Nations have thus long been keen on reaping the economic benefits of the T&T industry, many actively working toward enhancing its growth. More recently, several government and business leaders have embraced the idea that long-term industry profitability can be achieved only by striking a balance between industry growth and national “carrying capacity” or “sustainability.” In line with this thinking, this year’s *Report* places great emphasis on the topic of environmentally sustainable tourism, and the TTCI discussed in this chapter includes a reinforced focus on environmental sustainability, as described in Box 1.

Despite the overall importance of developing the T&T sector, many obstacles at the national level continue to hinder its development. In this light, the TTCI aims to measure the many different regulatory and business-related issues that have been identified as levers for improving T&T competitiveness in countries around the world. Through detailed analysis of each pillar and subpillar of the Index, businesses and governments can address the challenges to the sector’s growth.

This *Report* aims to serve two purposes. First, by providing a cross-country analysis of the drivers of T&T

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competitiveness, we intend to provide the industry with useful comparative information and an important benchmarking tool for making decisions related to business/industry development. Second, and more importantly, the analysis provides an opportunity for the T&T industry to highlight to national policymakers the obstacles to T&T competitiveness that require policy attention, and to enable dialogue between the private and public sectors for improving the environment for developing the T&T industry at the national level.

The Forum is committed to publishing the *Report* series on a yearly basis in an effort to ensure that it becomes a leading strategic tool used by both business and governments for creating blueprints for sustainable and viable Travel & Tourism development.

The Travel & Tourism Competitiveness Index

The Travel & Tourism Competitiveness Index (TTCI) was developed within the context of the World Economic Forum's Industry Partnership Programme for the Aviation, Travel and Tourism sector. The TTCI aims to measure *the factors and policies that make it attractive to develop the T&T sector in different countries*. The Index was

developed in close collaboration with our strategic design partner Booz Allen Hamilton, and our data partners Deloitte, the International Air Transport Association (IATA), the IUCN, the UNWTO, and the WTTC. We have also received important feedback from a number of key companies that are industry partners in the effort, namely Abercrombie & Kent, Bombardier, British Airways, Carlson, Emirates Airline, Hertz, Silversea Cruises Group, Swiss International Airlines, and Travelport.

The TTCI is based on three broad categories of variables that facilitate or drive T&T competitiveness. These categories are summarized into the three subindexes of the Index that we introduced last year: (1) the T&T regulatory framework subindex; (2) the T&T business environment and infrastructure subindex; and (3) the T&T human, cultural, and natural resources subindex. The first subindex captures those elements that are policy related and generally under the purview of the government; the second subindex captures elements of the business environment and the "hard" infrastructure of each economy; and the third subindex captures the "softer" human, cultural, and natural elements of each country's resource endowments.

Box 1: The pursuit of environmental sustainability

A sustainable T&T industry is one that optimizes the use of national resources with minimum ecological, cultural, and social impact, while maximizing the benefits to the environment and community.¹

The need for achieving a sustainable T&T industry is certainly not a new idea. However, the need for the industry to demonstrate leadership by introducing policy instruments that target the achievement of sustainability has become important only in recent years, primarily as a result of increased global awareness of the impact of global climate change on tourist destinations.

As more regions and countries develop their tourism industries, this has significant effects on natural resources, consumption patterns, pollution, and social systems. The resulting impact on tourism destination ecosystems makes the introduction of policy instruments aimed at achieving tourism sustainability, in particular related to the environment, a crucial element of national tourism development strategies. It is now widely accepted within the industry that those nations that will ultimately become the most competitive in the T&T sector will be those demonstrating their ability to implement measures to conserve the environment, or to correct possible damage to it, while continuing to facilitate the sector's healthy growth.

Sustainable tourism should therefore be about introducing, refocusing, and/or re-adapting national policies. The goal is to find a balance between limits and usage so that continuous

changing, monitoring, and planning ensure that tourism can be properly managed. This requires thinking long term (10 or even upward of 20 years into the future) and recognizing that change is often cumulative, gradual, and irreversible.²

In recognition of the interrelation between sustainability and T&T competitiveness, and in particular the interdependence of tourism development with maintaining the quality of the natural environment, the second edition of the TTCI described in this chapter introduces an "environmental sustainability" pillar. Developed together with the IUCN and the UNWTO, this pillar, described more in detail in the text, aims to assess how well nations are performing with regard to managing their natural environments. In addition, several other chapters in this volume explore various aspects of environmental sustainability and T&T development.

The World Economic Forum is actively collaborating with the UNWTO on environmental sustainability issues beyond this *Report* series. The aim of this collaboration is, among others, to express the Forum's support for the UNWTO's work on Tourism and Climate Change, including the Forum's endorsement of the UNWTO Davos Declaration.³

Notes

- 1 Gómez Gómez et al. 2004.
- 2 Sustainable Tourism Development Center.
- 3 Available at <http://www.world-tourism.org/pdf/pr071046.pdf>.

Each of these three subindexes is composed in turn of a number of “pillars” of T&T competitiveness, of which there are 14 in all. These are:

1. *Policy rules and regulations*
2. *Environmental sustainability*
3. *Safety and security*
4. *Health and hygiene*
5. *Prioritization of Travel & Tourism*
6. *Air transport infrastructure*
7. *Ground transport infrastructure*
8. *Tourism infrastructure*
9. *ICT infrastructure*
10. *Price competitiveness in the T&T industry*
11. *Human resources*
12. *Affinity for Travel & Tourism*
13. *Natural resources*
14. *Cultural resources*

Figure 1 summarizes the structure of the overall Index, showing how the 14 component pillars are allocated within the three subindexes.

Each of the pillars is, in turn, made up of a number of individual variables. The dataset includes both hard data and Survey data from the World Economic Forum’s annual Executive Opinion Survey. The hard data were obtained from publicly available sources, international organizations, and T&T institutions and experts (for example, the IATA, the IUCN, UNESCO, the UNWTO, and the WTTC). The Survey is carried out among CEOs and top business leaders in all economies covered by our research; these are the people making the investment decisions in their respective economies. The Survey provides unique data on many qualitative institutional and business environment issues, as well as specific issues related to the T&T industry and the quality of the natural environment.

The *policy rules and regulations* pillar captures the extent to which the policy environment is conducive to developing the T&T sector in each country. Governments can have an important impact on the attractiveness of developing this sector, depending on whether the policies that they create and perpetuate support or hinder its development. Sometimes well-intentioned policies can end up creating red tape or obstacles that have the opposite effect from what was intended. In this pillar we take into account the extent to which foreign ownership and foreign direct investment (FDI) are welcomed and facilitated by the country, how well property rights are protected, the time and cost required for setting up a business, the extent to which visa requirements make it complicated for visitors to enter the country, and the openness of the bilateral Air Service Agreements into which the government has entered with other countries.

The importance of the natural environment for providing an attractive location for tourism cannot be overstated, and it is clear that policies and factors

enhancing *environmental sustainability* are crucial for ensuring that a country will continue to be an attractive destination going into the future. In this pillar we measure the stringency of the government’s environmental regulations in each country, as well as the extent to which they are actually enforced. Given the environmental impacts that tourism itself can sometimes bring about, we also take into account the extent to which governments prioritize the sustainable development of the T&T industry in their respective economies. In addition to policy inputs, this pillar includes some of the related environmental outputs, including carbon dioxide emissions, and the percentage of endangered species in the country.

Safety and security is a critical factor determining the competitiveness of a country’s T&T industry. Tourists are likely to be deterred from traveling to dangerous countries or regions, making the T&T sector less attractive to develop in those places. Here, we take into account the costliness of common crime and violence as well as terrorism, and the extent to which police services can be relied upon to provide protection from crime, as well as the incidence of road traffic accidents in the country.

Health and hygiene is also essential for T&T competitiveness. The access within the country to improved drinking water and sanitation is important for the comfort and health of travelers. And in the event that tourists do become ill, the country’s health sector must be able to ensure they are properly cared for, as measured by the availability of physicians and hospital beds.

The extent to which the government *prioritizes the T&T sector* also has an important impact on T&T competitiveness. By making clear that T&T is a sector of primary concern, and by reflecting this in its budget priorities, the government can channel needed funds to essential development projects. It also sends a signal of its intentions, which can have positive spillover effects, such as attracting further private investment into the sector. Prioritization of the sector can be reflected in a variety of other ways as well, such as ensuring the country’s attendance at international T&T fairs and commissioning high-quality “destination-marketing” campaigns.

Quality *air transport infrastructure* provides ease of access to and from countries, as well as movement to destinations within countries. In this pillar we measure both the *quantity* of air transport, as measured by the available seat kilometers, the number of departures, airport density, and the number of operating airlines, and the *quality* of the air transport infrastructure both for domestic and international flights.

Vital for ease of movement within the country is the extensiveness and quality of the country’s *ground transport infrastructure*. This takes into account the quality of roads, railroads, and ports, as well as the extent to which the national transport network as a whole offers efficient, accessible transportation to key business centers and tourist attractions within the country.

We have also included a pillar that captures a number of aspects of the general *tourism infrastructure* in each country, as distinct from the general transport infrastructure. This takes into account the accommodation infrastructure (the number of hotel rooms) and the presence of major car rental companies in the country, as well as a measure of the financial infrastructure for tourists in the country (the availability of automatic teller machines, or ATMs).

Given the increasing importance of the online environment for the modern T&T industry, for planning itineraries and purchasing travel and accommodations, we also capture the quality of the *ICT infrastructure* in each economy. Here we measure ICT penetration rates (Internet, telephone lines, and broadband), which provide a sense of the society's online activity. We also include a specific measure of the extent to which the Internet is used by businesses in carrying out transactions in the economy, to get a sense of the extent to which these tools are in fact being used for business (including T&T) transactions in the economy.

The *price competitiveness in the T&T industry* is clearly an important element to take into account, with lower costs increasing the attractiveness of some countries for many travelers. To measure countries' price competitiveness, we take into account factors such as the extent to which goods and services in the country are more or less expensive than elsewhere (purchasing power parity), airfare ticket taxes and airport charges (which can make flight tickets much more expensive), fuel price levels compared with those of other countries, and taxation in the country (which can be passed through to travelers) as well as the relative cost of hotel accommodations.

Quality *human resources* in the economy ensure that the industry has access to the collaborators it needs to develop and grow. This pillar takes into account the health and the education and training levels in each economy, and is made up of two specific subpillars. The *education and training* subpillar measures educational attainment rates (primary and secondary), as well as the overall quality of the educational system in each country, as assessed by the business community. Besides the formal educational system, we also take into account private sector involvement in upgrading human resources, including the availability of specialized training services and the extent of staff training by companies in the country. The subpillar measuring the *availability of qualified labor* further takes into account the extent to which hiring and firing is impeded by regulations, and whether labor regulations make it easy or difficult to hire foreign labor. The health of the workforce is also included here, as measured by the overall life expectancy of the country as well as the specific costliness of HIV/AIDS to businesses.

Also included is the *affinity for Travel & Tourism*, which measures the extent to which the country and society are open to tourism and foreign visitors. It is

clear that the general openness of the population to travel and to foreign visitors has an important impact on T&T competitiveness. In particular, we provide a measure of the national population's attitude toward foreign travelers; a measure of the extent to which business leaders are willing to recommend leisure travel in their countries to important business contacts; and a measure of tourism openness (tourism expenditures and receipts as a percentage of GDP), which provides a sense of the importance of tourism relative to the country's overall size.

It is also clear that *natural resources* are an important factor underlying national T&T competitiveness. Countries that are able to offer travelers access to natural assets clearly have a competitive advantage. In this pillar we include a number of environmental attractiveness measures, including the number of UNESCO natural World Heritage sites, a measure of the quality of the natural environment, the richness of the fauna in the country as measured by the total known species of animals, and the percentage of protected areas.

Finally, the *cultural resources* at each country's disposal are also a critical driver of T&T competitiveness around the world. In this pillar we include a measure of cultural heritage (the number of UNESCO cultural World Heritage sites) and sports stadium seat capacity, as well as the number of international fairs and exhibitions in the country.

These 14 pillars are regrouped into the three subindexes described above, as shown in Figure 1, and the overall score for each country is derived as an unweighted average of the three subindexes. The details of the composition of the TTCI are shown in Appendix A.

Adjustments to the Travel & Tourism Competitiveness Index this year

Some adjustments have been made to the TTCI this year. The changes are of three types: the number of countries covered has increased, there have been some adjustments to the structure of the model, and we have added additional data for important issue areas that were previously missing.

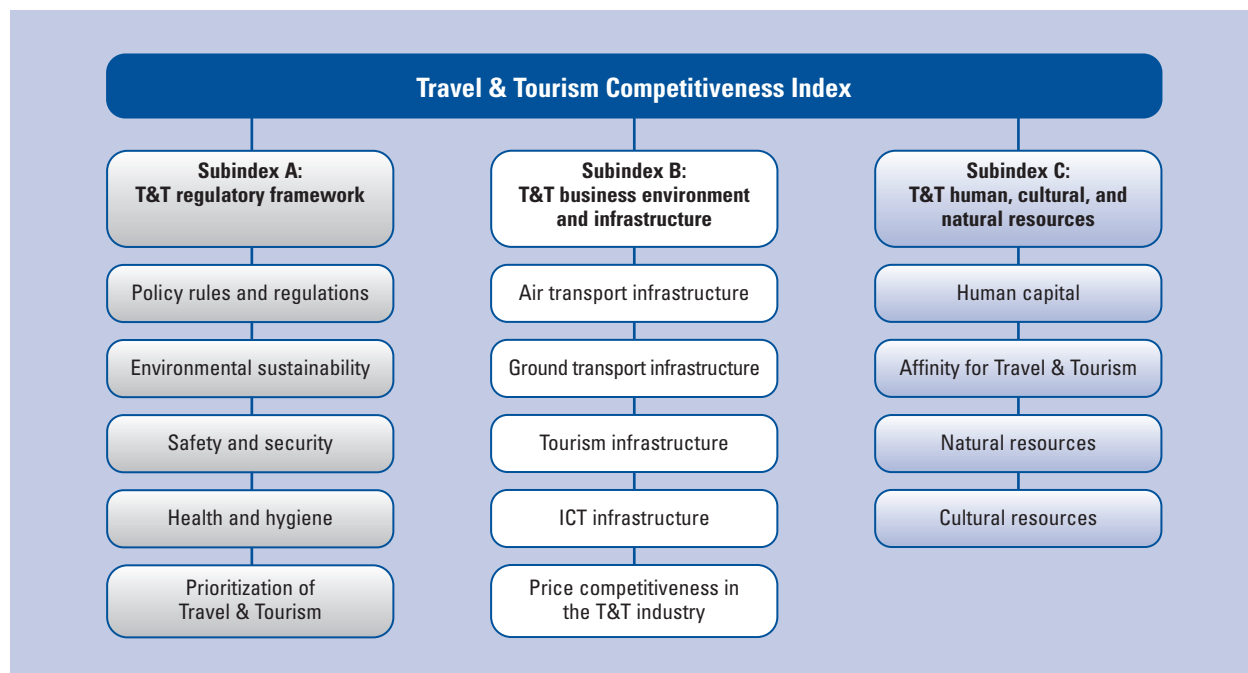
Country coverage

Seven new economies have been included in the analysis: Puerto Rico, Libya, Oman, Saudi Arabia, Senegal, Syria, and Uzbekistan. In addition, Serbia and Montenegro, previously analyzed as a single country, are now each included separately. This has increased our coverage to a total of 130 countries this year.

Adjustments to the model

Although we have maintained the basic structure and overall logic of the model as originally presented, we have introduced refinements to reflect the results of our experience working with the Index over the past year,

Figure 1: Composition of the three subindexes of the TTCI



and to include new data that have recently become available.

First, what was last year called the “environmental regulation” pillar (pillar 2) has been revised and improved based on our collaboration with the IUCN and the UNWTO, and is this year re-named the “environmental sustainability” pillar to better reflect its components and to capture the increasingly recognized importance of sustainability in the sector’s development. Being a first iteration, we consider the environmental sustainability pillar to be a work-in-progress, which we will continue to strengthen in coming years as more relevant data become available. In its present form it should be viewed as a preliminary estimate of a nation’s approach toward conservation of the environment, rather than a fully comprehensive assessment of its ability to achieve long-term environmental sustainability. We present the pillar this year with the belief that it already contains very useful indications of each nation’s understanding of the importance of environmental protection and the related ability to achieve long-term sustainable growth in the sector, as environmental conservation increasingly becomes a driver of national T&T competitiveness.

Second, what was last year a single pillar, “natural and cultural resources,” has been broken into its two subcomponents to create the two distinct pillars of natural resources and cultural resources. This provides a more nuanced and useful description of the strengths and weaknesses of countries, as these are in reality two quite different types of resources, with different policy implications in many cases.

Third, we have renamed what was last year called the “national tourism perception” pillar to the “affinity for Travel & Tourism” pillar. The elements included remain the same but the new title better captures the concept we are trying to measure.

New data

Throughout the model we have used better data proxies for some variables and included a number of new concepts that were previously missing from the model. For example, in the policy rules and regulations pillar we have introduced variables measuring the time and cost to start a business, since this can be an important deterrent to the industry’s development. As mentioned above, within the environmental sustainability pillar we have included a number of new variables that measure this concept, and this year we present data on carbon dioxide emissions, particulate matter concentration, the percentage of endangered species, and an index of ratified environmental treaties and conventions. Similarly, to better capture the natural and cultural resources, we separated the number of World Heritage sites into two variables (last year included together), and included new data on the total known species of animals in the country, the overall quality of the national environment, and the number of international fairs and exhibitions held in the country annually. Finally, within the price competitiveness in the T&T industry pillar, we have incorporated a hotel price index, which has been calculated for the first time this year specifically for inclusion in the TTCI.

Given the number of changes that have been made to the model this year, the rankings are not directly comparable with those of last year. However, from here forward we plan to maintain the current overall structure, which will allow us to make meaningful comparisons between years starting next year. This will serve the important purpose of allowing countries to track their progress in the different issue areas over time.

Based upon data availability, this year the TTCI measures the T&T competitiveness for 130 economies, covering all of the world's regions and accounting for approximately 90 percent of the world's population and 98 percent of world GDP.

The Travel & Tourism Competitiveness Index 2008 rankings

The rankings from this year's TTCI are shown in Tables 1 through 4, providing a summary of the T&T competitiveness of each country. The results are positively correlated with a number of T&T indicators. For example, Figures 2 and 3 show the correlation between the TTCI and tourist arrivals and between the TTCI and tourism receipts, respectively (both shown in log form) in 2006. As the figures show, the Index is quite highly correlated with both the number of tourists actually traveling to various countries and the annual income generated from Travel & Tourism, with few notable outliers. This supports the idea that the TTCI captures factors that are important for developing the T&T industry in countries.

The rest of this section will discuss some of the highlights of the rankings in a regional context, grouping countries into the following five regional groups: Europe and North America, Asia and Oceania, Latin America and the Caribbean (LAC), Middle East and North Africa (MENA), and sub-Saharan Africa. For further details for each of the 130 economies included in this Index, we provide two-page profiles in Part 2 of the *Report*. The profiles show the rankings on each subindex and pillar, as well as each of the 71 factors included in the Index.

Europe and North America

Table 1 shows that many countries from Europe and North America do very well in the rankings. Switzerland is ranked 1st in the 2008 TTCI, followed by Austria and Germany, the same top three countries as in the 2007 TTCI.

Switzerland is a country rich in cultural and natural resources, including an impressive number of World Heritage cultural and natural sites for a country of its size. A large percentage of the country's land area is protected (ranked 12th) and the natural environment is assessed as being among the most pristine in the world (ranked 10th). This natural heritage is buttressed by a strong national focus on environmental sustainability: Switzerland is ranked 2nd overall on this pillar, based on

strong and well-enforced environmental legislation and with a particular focus on developing the T&T sector sustainably.

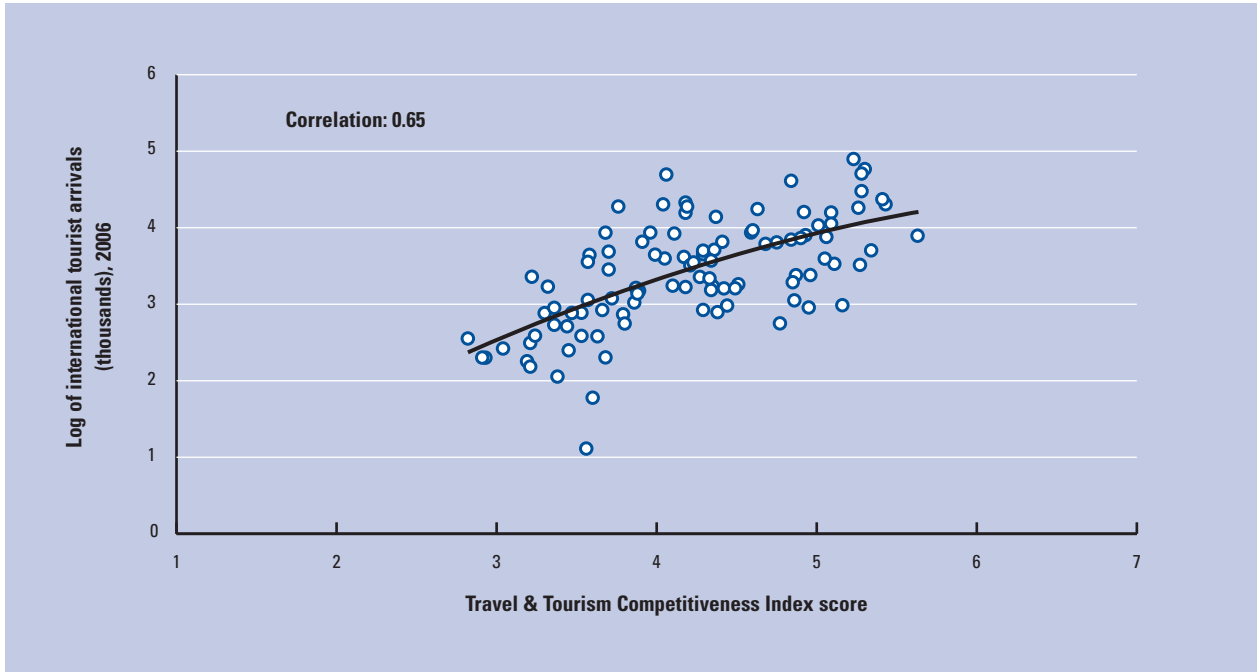
As well as being endowed with features that make it an attractive leisure tourism destination, Switzerland is also an important business travel hub, with many international fairs and exhibitions held in the country each year. Staffing of the industry is also facilitated by excellent education and training (ranked 4th), perhaps not surprising in a country with many of the best hotel management schools. Added to these strengths is Switzerland's excellent transport infrastructure (ranked 5th worldwide), with top-quality roads and railroads and an excellent domestic transport network. Also well assessed is the specific tourism infrastructure (ranked 7th), with readily available hotel rooms and ATMs for cash withdrawals. Such high-quality infrastructure makes a tourist's stay in the country easy and comfortable, an experience that is reinforced by the high level of general safety and security (ranked 6th).

Austria is ranked 2nd in the TTCI, attributable to its rich cultural resources, with eight World Heritage cultural sites, and many fairs and exhibitions catering to business travelers. The natural environment is also well assessed, along with the country's focus on environmental sustainability. In addition, Austrians are perceived as extremely open and welcoming to foreign travelers (ranked 3rd). Austria's tourism infrastructure is assessed as second to none, with abundant car rental facilities, hotel accommodations, and ATMs. Other strengths include Austria's assessment as one of the safest countries in the world (ranked 3rd), and its excellent health and hygiene levels (ranked 4th).

Germany, ranked 3rd, is also characterized by abundant cultural resources: Germany is ranked 3rd worldwide for its 31 World Heritage cultural sites, and 2nd for the number of international fairs and exhibitions held in the country. The country's infrastructure is among the best in the world, ranked 3rd for the quality of its ground transport infrastructure and 7th for its air transport infrastructure. In addition, Germany gets better marks than Switzerland and Austria for the policy rules and regulations affecting the T&T industry: it is ranked 6th in this area, with policies encouraging foreign investment, and bilateral Air Service Agreements that are assessed as open.

Spain and **France** also place among the top 10, with Spain at 5th and France at 10th place. Both countries benefit from their rich cultural resources, ranked 2nd and 4th worldwide, respectively, for their number of World Heritage cultural sites. Both have built up excellent infrastructure: France's ground and air transport infrastructure are among the best in the world and Spain's tourism infrastructure is ranked 1st internationally. The Index shows that France's policy rules and regulations are more conducive to developing the sector than Spain's, while Spain's labor market makes finding

Figure 2: T&T competitiveness and tourist arrivals



Source: United Nations World Tourism Organization; World Economic Forum.

Figure 3: T&T competitiveness and tourism receipts



Source: United Nations World Tourism Organization; World Economic Forum.

Table 1: The Travel & Tourism Competitiveness Index

Country/Economy	SUBINDEXES							
	OVERALL INDEX		T&T Regulatory framework		T&T Business environment and infrastructure		T&T Human, cultural, and natural resources	
	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Switzerland	1	5.63	1	5.94	2	5.55	3	5.39
Austria	2	5.43	4	5.86	8	5.27	7	5.16
Germany	3	5.41	6	5.67	3	5.43	9	5.13
Australia	4	5.34	30	5.23	11	5.18	1	5.61
Spain	5	5.30	28	5.24	5	5.32	4	5.33
United Kingdom	6	5.28	26	5.28	6	5.32	5	5.26
United States	7	5.28	49	4.75	1	5.58	2	5.52
Sweden	8	5.27	9	5.62	15	5.05	8	5.15
Canada	9	5.26	23	5.31	4	5.40	10	5.07
France	10	5.23	12	5.57	7	5.28	12	4.85
Iceland	11	5.16	3	5.86	9	5.21	36	4.40
Finland	12	5.11	5	5.74	23	4.80	14	4.78
Denmark	13	5.10	10	5.61	10	5.20	28	4.49
Hong Kong SAR	14	5.09	2	5.91	16	5.04	42	4.31
Portugal	15	5.09	14	5.50	22	4.83	11	4.93
Singapore	16	5.06	7	5.67	13	5.13	37	4.39
Norway	17	5.05	8	5.66	19	4.90	20	4.60
Netherlands	18	5.01	22	5.35	14	5.11	21	4.58
New Zealand	19	4.96	15	5.48	26	4.72	17	4.70
Luxembourg	20	4.95	24	5.28	12	5.17	35	4.41
Ireland	21	4.93	11	5.57	20	4.90	41	4.31
Greece	22	4.92	17	5.46	30	4.63	18	4.66
Japan	23	4.90	34	5.11	21	4.88	16	4.73
Cyprus	24	4.87	27	5.24	17	5.04	40	4.34
Malta	25	4.86	13	5.56	25	4.73	43	4.28
Estonia	26	4.85	18	5.41	18	4.91	49	4.22
Belgium	27	4.84	21	5.36	31	4.61	22	4.56
Italy	28	4.84	41	4.99	24	4.77	15	4.74
Barbados	29	4.77	16	5.46	32	4.58	46	4.26
Czech Republic	30	4.75	20	5.38	37	4.37	25	4.51
Korea, Rep.	31	4.68	38	5.02	34	4.52	29	4.49
Malaysia	32	4.63	37	5.04	39	4.31	23	4.55
Hungary	33	4.60	19	5.40	41	4.18	50	4.21
Croatia	34	4.59	39	5.02	38	4.32	32	4.43
Israel	35	4.51	32	5.12	36	4.39	59	4.02
Slovenia	36	4.49	42	4.97	33	4.53	61	3.98
Qatar	37	4.44	43	4.90	35	4.50	65	3.92
Slovak Republic	38	4.42	33	5.11	46	3.94	51	4.19
Tunisia	39	4.41	25	5.28	49	3.86	57	4.08
United Arab Emirates	40	4.39	44	4.87	27	4.69	89	3.62
Mauritius	41	4.38	29	5.23	44	4.14	76	3.78
Thailand	42	4.37	63	4.46	42	4.17	30	4.49
Bulgaria	43	4.36	50	4.75	52	3.84	31	4.48
Costa Rica	44	4.35	48	4.76	56	3.76	24	4.52
Latvia	45	4.34	35	5.10	43	4.17	82	3.75
Puerto Rico	46	4.34	40	4.99	40	4.27	80	3.75
Lithuania	47	4.33	31	5.21	45	4.00	74	3.79
Bahrain	48	4.29	68	4.36	28	4.64	69	3.88
Brazil	49	4.29	84	4.11	67	3.55	6	5.21
Panama	50	4.29	52	4.66	47	3.94	47	4.25
Chile	51	4.27	45	4.86	54	3.82	54	4.14
Taiwan, China	52	4.23	69	4.32	29	4.63	79	3.75
Jordan	53	4.21	36	5.06	60	3.64	64	3.92
Turkey	54	4.19	56	4.57	57	3.73	44	4.28
Mexico	55	4.18	71	4.30	61	3.62	19	4.62
Poland	56	4.18	60	4.51	62	3.62	34	4.42
Jamaica	57	4.18	51	4.74	48	3.87	66	3.92
Argentina	58	4.17	65	4.44	64	3.57	27	4.50
Montenegro	59	4.15	53	4.66	68	3.53	45	4.27
South Africa	60	4.11	70	4.31	51	3.85	52	4.18
Uruguay	61	4.10	47	4.84	71	3.37	56	4.09
China	62	4.06	103	3.91	70	3.45	13	4.81
Dominican Republic	63	4.05	54	4.64	63	3.61	67	3.89
Russian Federation	64	4.04	80	4.21	65	3.56	39	4.35
India	65	3.99	107	3.78	59	3.70	26	4.50
Egypt	66	3.96	58	4.54	69	3.47	70	3.86

(Cont'd.)

Table 1: The Travel & Tourism Competitiveness Index (cont'd.)

Country/Economy	SUBINDEXES							
	OVERALL INDEX		T&T Regulatory framework		T&T Business environment and infrastructure		T&T Human, cultural, and natural resources	
	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Morocco	67	3.91	55	4.59	75	3.32	72	3.81
Guatemala	68	3.89	76	4.25	77	3.30	55	4.12
Romania	69	3.88	72	4.29	66	3.55	73	3.79
Peru	70	3.87	86	4.08	88	3.10	33	4.43
Colombia	71	3.86	95	4.03	83	3.20	38	4.35
Georgia	72	3.83	46	4.84	94	2.95	85	3.70
Sri Lanka	73	3.80	79	4.24	81	3.21	63	3.95
Trinidad and Tobago	74	3.79	87	4.08	50	3.86	104	3.44
Honduras	75	3.79	77	4.25	85	3.16	62	3.96
Oman	76	3.77	88	4.07	58	3.70	96	3.54
Ukraine	77	3.76	59	4.53	78	3.24	100	3.51
Serbia	78	3.76	73	4.27	72	3.36	88	3.64
Azerbaijan	79	3.72	62	4.49	79	3.24	105	3.44
Indonesia	80	3.70	108	3.78	86	3.16	53	4.17
Philippines	81	3.70	83	4.14	84	3.20	78	3.75
Saudi Arabia	82	3.68	106	3.83	55	3.78	107	3.43
Macedonia, FYR	83	3.68	93	4.05	80	3.23	81	3.75
Gambia, The	84	3.67	67	4.38	87	3.11	97	3.53
Kuwait	85	3.67	105	3.88	53	3.82	119	3.31
Ecuador	86	3.66	101	3.99	95	2.94	58	4.05
Botswana	87	3.65	82	4.20	76	3.31	103	3.45
Tanzania	88	3.65	89	4.07	117	2.65	48	4.23
Armenia	89	3.63	57	4.56	108	2.73	94	3.59
Uzbekistan	90	3.62	64	4.45	98	2.90	101	3.51
Kazakhstan	91	3.61	61	4.50	96	2.94	112	3.39
Albania	92	3.60	81	4.20	105	2.75	71	3.85
Namibia	93	3.59	92	4.05	74	3.34	113	3.38
Syria	94	3.58	74	4.26	97	2.93	95	3.55
Suriname	95	3.58	110	3.75	89	3.09	68	3.88
Vietnam	96	3.57	97	4.02	92	2.98	84	3.71
El Salvador	97	3.57	85	4.09	73	3.36	121	3.25
Moldova	98	3.56	66	4.39	100	2.89	110	3.39
Nicaragua	99	3.53	96	4.03	99	2.90	87	3.67
Mongolia	100	3.53	78	4.25	106	2.74	91	3.60
Kenya	101	3.53	100	4.00	102	2.82	77	3.76
Algeria	102	3.50	99	4.01	93	2.97	98	3.52
Venezuela	103	3.47	123	3.44	82	3.21	75	3.78
Libya	104	3.45	75	4.26	115	2.66	106	3.43
Bosnia and Herzegovina	105	3.45	98	4.02	91	2.99	117	3.33
Bolivia	106	3.44	122	3.45	101	2.84	60	4.02
Zambia	107	3.42	91	4.06	118	2.60	90	3.62
Senegal	108	3.41	94	4.04	104	2.76	108	3.43
Guyana	109	3.38	104	3.88	114	2.67	93	3.60
Uganda	110	3.36	113	3.66	112	2.68	83	3.74
Pakistan	111	3.36	114	3.65	90	3.02	109	3.39
Cambodia	112	3.32	116	3.61	116	2.65	86	3.69
Kyrgyz Republic	113	3.30	90	4.07	128	2.37	102	3.47
Tajikistan	114	3.24	102	3.95	126	2.40	111	3.39
Paraguay	115	3.24	112	3.72	111	2.68	118	3.32
Nepal	116	3.22	120	3.58	122	2.56	99	3.51
Zimbabwe	117	3.22	118	3.60	113	2.67	114	3.37
Madagascar	118	3.21	111	3.73	107	2.74	124	3.16
Mali	119	3.21	109	3.77	124	2.49	116	3.36
Benin	120	3.19	115	3.63	121	2.58	115	3.36
Ethiopia	121	3.18	126	3.20	110	2.72	92	3.60
Mauritania	122	3.10	117	3.60	120	2.59	125	3.11
Mozambique	123	3.05	119	3.59	119	2.59	128	2.97
Burkina Faso	124	3.04	121	3.56	123	2.56	127	3.01
Nigeria	125	3.03	127	3.15	109	2.73	123	3.19
Cameroon	126	2.99	125	3.39	129	2.31	120	3.25
Bangladesh	127	2.93	129	2.94	103	2.79	126	3.07
Burundi	128	2.91	128	3.15	127	2.39	122	3.20
Lesotho	129	2.82	124	3.39	125	2.46	130	2.61
Chad	130	2.48	130	2.74	130	1.99	129	2.69

Table 2: The Travel & Tourism Competitiveness Index: Regulatory framework

Country/Economy	T&T REGULATORY FRAMEWORK		PILLARS									
	Rank	Score	1. Policy rules and regulations		2. Environmental sustainability		3. Safety and security		4. Health and hygiene		5. Prioritization of Travel & Tourism	
			Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Albania	81	4.20	104	3.69	93	4.08	71	4.93	59	4.76	104	3.55
Algeria	99	4.01	83	4.00	102	3.99	83	4.72	81	4.12	118	3.20
Argentina	65	4.44	91	3.95	107	3.94	98	4.45	40	5.62	70	4.23
Armenia	57	4.56	63	4.28	112	3.88	45	5.43	39	5.65	105	3.55
Australia	30	5.23	27	5.04	53	4.63	21	5.85	37	5.72	32	4.92
Austria	4	5.86	22	5.16	8	5.57	3	6.41	4	6.77	19	5.41
Azerbaijan	62	4.49	72	4.14	101	4.01	43	5.46	49	5.22	101	3.63
Bahrain	68	4.36	62	4.35	125	3.49	39	5.58	76	4.25	75	4.12
Bangladesh	129	2.94	114	3.31	121	3.71	129	2.83	117	2.11	122	2.77
Barbados	16	5.46	29	5.02	26	5.05	27	5.74	31	5.91	13	5.60
Belgium	21	5.36	16	5.28	11	5.49	29	5.71	14	6.51	91	3.81
Benin	115	3.63	117	3.23	30	4.97	77	4.86	121	1.74	112	3.35
Bolivia	122	3.45	127	2.88	104	3.98	92	4.53	102	3.09	121	2.79
Bosnia and Herzegovina	98	4.02	109	3.47	113	3.87	57	5.13	55	4.88	124	2.72
Botswana	82	4.20	74	4.13	68	4.42	50	5.26	97	3.24	82	3.95
Brazil	84	4.11	95	3.81	37	4.90	128	3.15	69	4.46	68	4.24
Bulgaria	50	4.75	85	3.98	73	4.35	90	4.56	12	6.56	65	4.28
Burkina Faso	121	3.56	107	3.62	64	4.47	82	4.76	124	1.46	108	3.50
Burundi	128	3.15	125	2.92	88	4.14	96	4.49	116	2.19	130	2.00
Cambodia	116	3.61	126	2.89	92	4.09	95	4.50	128	1.13	17	5.47
Cameroon	125	3.39	112	3.31	109	3.92	86	4.63	114	2.42	126	2.69
Canada	23	5.31	8	5.43	36	4.90	32	5.68	45	5.48	26	5.05
Chad	130	2.74	130	2.46	124	3.64	116	3.88	129	1.05	127	2.68
Chile	45	4.86	18	5.25	62	4.53	36	5.60	63	4.53	58	4.39
China	103	3.91	89	3.96	110	3.92	121	3.60	99	3.21	36	4.86
Colombia	95	4.03	60	4.36	87	4.17	118	3.75	78	4.22	99	3.68
Costa Rica	48	4.76	54	4.48	32	4.96	66	4.99	67	4.49	35	4.86
Croatia	39	5.02	66	4.26	41	4.84	41	5.52	28	5.99	51	4.48
Cyprus	27	5.24	69	4.20	47	4.73	23	5.82	43	5.53	3	5.93
Czech Republic	20	5.38	38	4.77	21	5.10	44	5.45	6	6.77	39	4.79
Denmark	10	5.61	4	5.59	3	5.88	4	6.40	34	5.82	62	4.35
Dominican Republic	54	4.64	47	4.57	108	3.93	89	4.57	65	4.52	14	5.59
Ecuador	101	3.99	111	3.43	82	4.24	97	4.48	73	4.39	110	3.42
Egypt	58	4.54	70	4.18	81	4.25	84	4.66	86	3.94	12	5.66
El Salvador	85	4.09	45	4.63	55	4.60	109	4.05	94	3.36	89	3.83
Estonia	18	5.41	26	5.06	43	4.82	26	5.75	20	6.27	23	5.14
Ethiopia	126	3.20	96	3.76	114	3.83	111	4.03	130	1.00	111	3.40
Finland	5	5.74	7	5.45	7	5.62	1	6.70	18	6.37	49	4.55
France	12	5.57	24	5.15	5	5.75	54	5.18	7	6.76	29	5.00
Gambia, The	67	4.38	93	3.90	59	4.57	38	5.58	107	2.68	22	5.19
Georgia	46	4.84	68	4.22	54	4.62	37	5.60	42	5.58	72	4.19
Germany	6	5.67	6	5.46	4	5.82	17	5.88	4	6.77	57	4.40
Greece	17	5.46	61	4.35	40	4.85	31	5.69	16	6.42	1	5.99
Guatemala	76	4.25	41	4.72	95	4.07	110	4.03	83	4.00	53	4.45
Guyana	104	3.88	120	3.19	76	4.30	112	4.01	92	3.62	66	4.27
Honduras	77	4.25	44	4.64	61	4.56	87	4.58	95	3.36	76	4.11
Hong Kong SAR	2	5.91	2	5.95	60	4.56	7	6.27	1	7.00	9	5.78
Hungary	19	5.40	35	4.82	25	5.05	28	5.73	11	6.57	37	4.80
Iceland	3	5.86	17	5.25	20	5.14	2	6.54	3	6.86	15	5.53
India	107	3.78	102	3.71	71	4.39	117	3.86	110	2.56	59	4.38
Indonesia	108	3.78	121	3.07	126	3.48	108	4.06	111	2.53	11	5.75
Ireland	11	5.57	3	5.64	12	5.48	19	5.87	24	6.17	40	4.70
Israel	32	5.12	30	5.02	67	4.43	60	5.09	8	6.69	61	4.37
Italy	41	4.99	57	4.42	39	4.87	81	4.80	19	6.28	46	4.58
Jamaica	51	4.74	13	5.34	99	4.02	102	4.36	82	4.01	2	5.96
Japan	34	5.11	32	4.96	48	4.73	74	4.89	23	6.25	41	4.70
Jordan	36	5.06	78	4.12	38	4.87	15	5.98	58	4.84	16	5.50
Kazakhstan	61	4.50	77	4.12	120	3.73	73	4.90	33	5.85	83	3.90
Kenya	100	4.00	101	3.72	19	5.25	120	3.69	118	2.08	20	5.29
Korea, Rep.	38	5.02	33	4.87	50	4.69	67	4.99	38	5.67	34	4.90
Kuwait	105	3.88	97	3.76	130	2.97	18	5.88	77	4.22	129	2.56
Kyrgyz Republic	90	4.07	105	3.64	91	4.09	100	4.43	71	4.43	97	3.74
Latvia	35	5.10	42	4.68	16	5.34	40	5.57	25	6.16	95	3.77
Lesotho	124	3.39	116	3.30	116	3.82	91	4.54	112	2.49	120	2.82
Libya	75	4.26	122	3.06	118	3.79	24	5.81	50	5.20	109	3.43
Lithuania	31	5.21	50	4.55	18	5.32	46	5.43	2	6.98	94	3.80

(Cont'd.)

Table 2: The Travel & Tourism Competitiveness Index: Regulatory framework (cont'd.)

Country/Economy	T&T REGULATORY FRAMEWORK		PILLARS									
			1. Policy rules and regulations		2. Environmental sustainability		3. Safety and security		4. Health and hygiene		5. Prioritization of Travel & Tourism	
	Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Luxembourg	24	5.28	14	5.32	22	5.10	9	6.17	22	6.26	103	3.57
Macedonia, FYR	93	4.05	75	4.13	84	4.20	80	4.82	68	4.48	128	2.63
Madagascar	111	3.73	84	4.00	74	4.35	99	4.43	126	1.32	48	4.56
Malaysia	37	5.04	12	5.34	44	4.79	42	5.51	70	4.43	24	5.12
Mali	109	3.77	106	3.63	65	4.46	64	5.02	123	1.59	74	4.17
Malta	13	5.56	51	4.53	42	4.82	12	6.13	10	6.59	10	5.75
Mauritania	117	3.60	113	3.31	86	4.19	47	5.33	125	1.38	93	3.80
Mauritius	29	5.23	28	5.03	46	4.73	33	5.66	57	4.85	4	5.91
Mexico	71	4.30	49	4.56	85	4.20	122	3.59	79	4.21	31	4.94
Moldova	66	4.39	94	3.89	70	4.40	70	4.94	47	5.38	113	3.35
Mongolia	78	4.25	80	4.06	119	3.76	78	4.86	64	4.52	78	4.05
Montenegro	53	4.66	37	4.78	105	3.95	53	5.19	52	5.12	67	4.26
Morocco	55	4.59	40	4.73	31	4.96	61	5.07	98	3.22	30	4.95
Mozambique	119	3.59	90	3.95	57	4.59	103	4.35	127	1.19	85	3.86
Namibia	92	4.05	88	3.96	34	4.93	72	4.92	108	2.62	86	3.86
Nepal	120	3.58	123	2.98	79	4.27	124	3.54	113	2.47	44	4.61
Netherlands	22	5.35	9	5.42	9	5.56	34	5.65	26	6.15	81	3.96
New Zealand	15	5.48	11	5.36	24	5.07	11	6.15	27	6.01	38	4.80
Nicaragua	96	4.03	92	3.94	49	4.72	51	5.24	109	2.59	100	3.67
Nigeria	127	3.15	99	3.73	56	4.60	130	2.67	122	1.68	119	3.08
Norway	8	5.66	20	5.20	6	5.69	5	6.37	29	5.98	28	5.03
Oman	88	4.07	76	4.12	103	3.99	35	5.65	106	2.76	90	3.82
Pakistan	114	3.65	71	4.17	96	4.03	126	3.26	96	3.28	107	3.53
Panama	52	4.66	34	4.83	45	4.77	56	5.14	80	4.17	55	4.42
Paraguay	112	3.72	119	3.19	123	3.65	101	4.43	87	3.79	106	3.54
Peru	86	4.08	64	4.28	77	4.28	106	4.12	93	3.37	60	4.37
Philippines	83	4.14	58	4.37	80	4.27	113	3.99	91	3.63	54	4.43
Poland	60	4.51	65	4.28	58	4.58	88	4.58	54	4.96	73	4.18
Portugal	14	5.50	21	5.19	15	5.36	16	5.94	30	5.96	27	5.04
Puerto Rico	40	4.99	15	5.31	14	5.36	55	5.15	60	4.67	52	4.45
Qatar	43	4.90	86	3.97	69	4.41	10	6.16	48	5.28	42	4.69
Romania	72	4.29	48	4.57	51	4.69	75	4.87	89	3.75	102	3.58
Russian Federation	80	4.21	110	3.46	117	3.79	127	3.16	9	6.65	80	3.98
Saudi Arabia	106	3.83	82	4.02	127	3.44	59	5.09	105	2.88	98	3.72
Senegal	94	4.04	118	3.20	52	4.65	52	5.20	104	2.91	69	4.24
Serbia	73	4.27	59	4.37	128	3.31	76	4.86	46	5.47	114	3.35
Singapore	7	5.67	1	6.19	27	4.98	8	6.23	53	5.05	5	5.87
Slovak Republic	33	5.11	31	5.00	23	5.07	30	5.70	13	6.52	117	3.29
Slovenia	42	4.97	87	3.97	17	5.34	20	5.85	36	5.79	84	3.89
South Africa	70	4.31	36	4.80	35	4.92	123	3.55	84	3.96	63	4.32
Spain	28	5.24	56	4.44	33	4.95	58	5.10	32	5.88	6	5.84
Sri Lanka	79	4.24	53	4.50	115	3.83	104	4.35	85	3.96	50	4.54
Suriname	110	3.75	129	2.77	106	3.95	68	4.95	72	4.40	125	2.69
Sweden	9	5.62	10	5.37	1	6.12	13	6.13	21	6.26	71	4.20
Switzerland	1	5.94	23	5.15	2	5.90	6	6.35	15	6.48	7	5.80
Syria	74	4.26	115	3.30	98	4.02	22	5.84	74	4.34	88	3.83
Taiwan, China	69	4.32	39	4.77	75	4.34	49	5.29	101	3.20	79	4.02
Tajikistan	102	3.95	108	3.56	97	4.02	63	5.04	88	3.78	116	3.33
Tanzania	89	4.07	79	4.07	29	4.97	105	4.31	119	2.07	33	4.92
Thailand	63	4.46	52	4.50	78	4.27	115	3.95	66	4.49	25	5.07
Trinidad and Tobago	87	4.08	46	4.59	129	3.28	107	4.08	61	4.66	92	3.80
Tunisia	25	5.28	25	5.10	13	5.41	25	5.80	75	4.32	8	5.78
Turkey	56	4.57	43	4.67	90	4.11	79	4.85	62	4.61	45	4.60
Uganda	113	3.66	103	3.69	28	4.98	114	3.99	120	1.79	87	3.84
Ukraine	59	4.53	100	3.72	83	4.23	93	4.53	17	6.40	96	3.76
United Arab Emirates	44	4.87	81	4.05	122	3.65	14	6.07	51	5.13	18	5.45
United Kingdom	26	5.28	5	5.54	10	5.56	65	5.01	41	5.58	43	4.69
United States	49	4.75	19	5.22	100	4.02	119	3.75	44	5.50	21	5.26
Uruguay	47	4.84	73	4.14	63	4.51	48	5.32	35	5.82	56	4.41
Uzbekistan	64	4.45	67	4.23	111	3.91	69	4.94	56	4.85	64	4.32
Venezuela	123	3.44	124	2.92	72	4.36	125	3.47	90	3.72	123	2.72
Vietnam	97	4.02	98	3.75	94	4.07	94	4.50	100	3.21	47	4.56
Zambia	91	4.06	55	4.47	66	4.46	62	5.04	115	2.24	77	4.06
Zimbabwe	118	3.60	128	2.83	89	4.13	85	4.65	103	3.06	115	3.34

Table 3: The Travel & Tourism Competitiveness Index: Business environment and infrastructure

Country/Economy	T&T BUSINESS ENVIRONMENT AND INFRASTRUCTURE		PILLARS									
	Rank	Score	6. Air transport infrastructure		7. Ground transport infrastructure		8. Tourism infrastructure		9. ICT infrastructure		10. Price competitiveness in T&T industry	
			Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Albania	105	2.75	112	2.20	116	2.55	86	2.53	86	2.16	90	4.33
Algeria	93	2.97	99	2.40	89	3.06	96	2.29	95	2.00	27	5.09
Argentina	64	3.57	67	2.94	90	3.05	53	3.91	54	3.03	41	4.94
Armenia	108	2.73	97	2.47	100	2.82	118	1.56	101	1.90	42	4.92
Australia	11	5.18	3	5.85	43	4.49	12	6.35	14	5.22	111	4.01
Austria	8	5.27	29	4.25	10	6.03	1	7.00	20	4.88	104	4.17
Azerbaijan	79	3.24	79	2.69	52	4.15	92	2.37	84	2.27	62	4.72
Bahrain	28	4.64	28	4.30	18	5.47	37	4.45	43	3.41	4	5.59
Bangladesh	103	2.79	116	2.12	69	3.56	122	1.29	122	1.52	10	5.44
Barbados	32	4.58	30	4.25	21	5.21	40	4.33	29	4.30	48	4.84
Belgium	31	4.61	38	3.97	7	6.36	41	4.30	24	4.64	122	3.76
Benin	121	2.58	122	2.00	128	2.31	87	2.53	114	1.64	81	4.42
Bolivia	101	2.84	108	2.25	114	2.59	99	2.21	106	1.81	14	5.32
Bosnia and Herzegovina	91	2.99	124	1.97	115	2.55	59	3.61	62	2.70	107	4.13
Botswana	76	3.31	77	2.72	72	3.50	78	2.80	92	2.05	6	5.49
Brazil	67	3.55	45	3.59	95	2.89	47	4.17	58	2.82	92	4.31
Bulgaria	52	3.84	101	2.38	77	3.40	22	5.42	44	3.40	69	4.62
Burkina Faso	123	2.56	126	1.95	102	2.80	94	2.30	121	1.52	101	4.22
Burundi	127	2.39	127	1.83	92	2.95	123	1.29	129	1.29	74	4.57
Cambodia	116	2.65	100	2.39	99	2.83	125	1.22	123	1.52	15	5.32
Cameroon	129	2.31	125	1.96	124	2.40	114	1.73	126	1.45	110	4.01
Canada	4	5.40	1	6.65	26	5.01	17	6.12	12	5.25	114	3.94
Chad	130	1.99	130	1.67	129	2.26	121	1.29	130	1.28	126	3.46
Chile	54	3.82	50	3.44	53	4.13	64	3.37	47	3.28	45	4.87
China	70	3.45	36	3.98	61	3.80	119	1.53	66	2.62	17	5.30
Colombia	83	3.20	63	3.06	101	2.81	81	2.77	70	2.59	55	4.78
Costa Rica	56	3.76	43	3.75	113	2.62	29	4.86	60	2.76	50	4.82
Croatia	38	4.32	66	2.96	54	4.05	10	6.63	37	3.72	98	4.26
Cyprus	17	5.04	25	4.50	17	5.47	3	6.95	34	3.99	95	4.28
Czech Republic	37	4.37	52	3.39	22	5.09	25	5.04	31	4.21	108	4.12
Denmark	10	5.20	12	4.98	6	6.48	23	5.31	5	5.78	128	3.43
Dominican Republic	63	3.61	46	3.54	80	3.33	45	4.23	75	2.44	76	4.49
Ecuador	95	2.94	84	2.65	119	2.49	89	2.49	81	2.30	53	4.80
Egypt	69	3.47	62	3.06	75	3.43	79	2.79	87	2.15	2	5.89
El Salvador	73	3.36	75	2.80	62	3.79	83	2.72	78	2.40	32	5.06
Estonia	18	4.91	55	3.26	25	5.01	11	6.36	17	5.14	60	4.75
Ethiopia	110	2.72	89	2.56	106	2.74	117	1.57	127	1.43	16	5.31
Finland	23	4.80	18	4.85	20	5.27	30	4.82	16	5.15	117	3.90
France	7	5.28	6	5.50	4	6.56	15	6.19	19	4.91	130	3.26
Gambia, The	87	3.11	90	2.56	64	3.77	102	2.09	107	1.81	18	5.29
Georgia	94	2.95	105	2.33	76	3.42	90	2.44	90	2.10	78	4.47
Germany	3	5.43	7	5.47	3	6.57	18	5.99	15	5.19	113	3.95
Greece	30	4.63	20	4.62	46	4.39	9	6.67	39	3.61	120	3.84
Guatemala	77	3.30	76	2.75	81	3.30	82	2.76	74	2.45	23	5.22
Guyana	114	2.67	110	2.24	108	2.72	127	1.08	80	2.31	36	4.99
Honduras	85	3.16	64	3.04	88	3.09	85	2.59	93	2.05	33	5.04
Hong Kong SAR	16	5.04	13	4.96	2	6.57	67	3.32	8	5.48	46	4.87
Hungary	41	4.18	65	2.98	32	4.81	27	4.89	35	3.82	79	4.43
Iceland	9	5.21	16	4.85	35	4.68	7	6.71	1	5.93	119	3.86
India	59	3.70	35	4.00	39	4.51	80	2.78	97	1.98	20	5.23
Indonesia	86	3.16	61	3.07	98	2.87	109	1.87	94	2.04	1	5.96
Ireland	20	4.90	24	4.54	45	4.45	5	6.78	27	4.47	99	4.24
Israel	36	4.39	47	3.52	31	4.86	36	4.51	22	4.75	91	4.32
Italy	24	4.77	26	4.43	40	4.51	4	6.88	25	4.57	124	3.49
Jamaica	48	3.87	53	3.28	38	4.53	55	3.81	45	3.38	85	4.38
Japan	21	4.88	21	4.61	9	6.33	46	4.18	18	4.98	94	4.28
Jordan	60	3.64	60	3.08	65	3.74	56	3.77	65	2.63	37	4.99
Kazakhstan	96	2.94	85	2.63	91	3.04	100	2.19	77	2.40	80	4.42
Kenya	102	2.82	73	2.83	107	2.73	98	2.27	108	1.80	75	4.50
Korea, Rep.	34	4.52	39	3.92	15	5.57	70	3.23	6	5.72	106	4.15
Kuwait	53	3.82	59	3.13	48	4.36	57	3.77	53	3.05	51	4.81
Kyrgyz Republic	128	2.37	119	2.08	121	2.43	129	1.06	112	1.67	70	4.62
Latvia	43	4.17	56	3.22	41	4.50	33	4.77	38	3.72	67	4.65
Lesotho	125	2.46	129	1.68	127	2.33	113	1.74	120	1.52	34	5.03
Libya	115	2.66	103	2.37	130	2.25	110	1.84	91	2.09	57	4.77
Lithuania	45	4.00	82	2.66	27	4.97	58	3.72	33	4.06	73	4.58

(Cont'd.)

Table 3: The Travel & Tourism Competitiveness Index: Business environment and infrastructure (cont'd.)

Country/Economy	T&T BUSINESS ENVIRONMENT AND INFRASTRUCTURE		PILLARS									
	Rank	Score	6. Air transport infrastructure		7. Ground transport infrastructure		8. Tourism infrastructure		9. ICT infrastructure		10. Price competitiveness in T&T industry	
			Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Luxembourg	12	5.17	37	3.97	14	5.61	14	6.19	7	5.58	77	4.48
Macedonia, FYR	80	3.23	113	2.14	79	3.36	61	3.55	72	2.53	72	4.59
Madagascar	107	2.74	91	2.54	120	2.45	88	2.50	128	1.43	52	4.81
Malaysia	39	4.31	32	4.18	28	4.95	71	3.19	46	3.37	3	5.89
Mali	124	2.49	117	2.10	96	2.88	116	1.63	117	1.58	97	4.27
Malta	25	4.73	22	4.56	34	4.79	19	5.97	32	4.11	100	4.24
Mauritania	120	2.59	115	2.12	111	2.67	120	1.43	109	1.79	40	4.94
Mauritius	44	4.14	48	3.48	30	4.90	42	4.29	61	2.73	19	5.27
Mexico	61	3.62	42	3.78	82	3.28	49	4.00	64	2.67	83	4.39
Moldova	100	2.89	118	2.08	104	2.78	91	2.44	82	2.29	49	4.83
Mongolia	106	2.74	74	2.82	125	2.40	107	1.92	103	1.84	61	4.74
Montenegro	68	3.53	54	3.27	71	3.50	31	4.81	63	2.67	129	3.40
Morocco	75	3.32	69	2.92	67	3.62	72	3.18	85	2.19	64	4.69
Mozambique	119	2.59	114	2.14	118	2.53	106	1.95	125	1.49	44	4.88
Namibia	74	3.34	51	3.40	55	4.04	84	2.67	105	1.83	54	4.78
Nepal	122	2.56	109	2.25	122	2.42	126	1.10	124	1.49	5	5.55
Netherlands	14	5.11	17	4.85	8	6.35	35	4.68	2	5.89	121	3.78
New Zealand	26	4.72	10	5.10	50	4.26	34	4.77	21	4.83	68	4.63
Nicaragua	99	2.90	102	2.37	126	2.34	77	2.93	110	1.79	31	5.07
Nigeria	109	2.73	106	2.32	109	2.68	95	2.29	111	1.77	71	4.61
Norway	19	4.90	9	5.23	36	4.61	21	5.86	11	5.36	125	3.47
Oman	58	3.70	57	3.21	56	3.99	63	3.53	71	2.56	22	5.22
Pakistan	90	3.02	94	2.49	68	3.62	101	2.19	104	1.83	38	4.99
Panama	47	3.94	34	4.06	58	3.94	44	4.27	76	2.41	35	5.03
Paraguay	111	2.68	128	1.82	123	2.42	103	2.03	102	1.90	21	5.23
Peru	88	3.10	86	2.60	105	2.75	73	3.13	83	2.28	58	4.76
Philippines	84	3.20	72	2.89	85	3.24	97	2.28	89	2.12	9	5.47
Poland	62	3.62	87	2.57	57	3.95	60	3.60	41	3.59	87	4.36
Portugal	22	4.83	31	4.19	24	5.03	13	6.32	30	4.24	86	4.36
Puerto Rico	40	4.27	11	5.09	29	4.93	54	3.85	50	3.18	93	4.30
Qatar	35	4.50	23	4.56	33	4.79	24	5.22	40	3.61	89	4.34
Romania	66	3.55	88	2.57	74	3.44	38	4.42	48	3.24	109	4.10
Russian Federation	65	3.56	33	4.14	83	3.25	66	3.33	51	3.08	112	3.98
Saudi Arabia	55	3.78	49	3.46	60	3.85	68	3.31	59	2.80	8	5.47
Senegal	104	2.76	78	2.70	94	2.89	93	2.34	100	1.94	116	3.92
Serbia	72	3.36	92	2.54	86	3.15	52	3.91	57	2.82	82	4.40
Singapore	13	5.13	15	4.93	1	6.61	43	4.28	23	4.67	25	5.18
Slovak Republic	46	3.94	104	2.35	37	4.61	28	4.87	42	3.51	84	4.38
Slovenia	33	4.53	70	2.90	23	5.06	20	5.93	26	4.55	102	4.21
South Africa	51	3.85	40	3.79	59	3.89	51	3.94	73	2.53	29	5.08
Spain	5	5.32	8	5.34	16	5.54	1	7.00	28	4.37	88	4.35
Sri Lanka	81	3.21	81	2.68	42	4.50	111	1.81	96	1.98	26	5.10
Suriname	89	3.09	93	2.52	117	2.53	65	3.34	79	2.37	63	4.69
Sweden	15	5.05	14	4.95	12	5.79	26	4.98	3	5.87	123	3.63
Switzerland	2	5.55	19	4.71	5	6.55	7	6.71	4	5.87	118	3.89
Syria	97	2.93	95	2.49	70	3.55	104	1.99	98	1.96	66	4.67
Taiwan, China	29	4.63	41	3.79	13	5.78	74	3.11	10	5.40	30	5.07
Tajikistan	126	2.40	121	2.02	110	2.67	128	1.07	118	1.57	65	4.67
Tanzania	117	2.65	107	2.28	93	2.94	115	1.67	115	1.61	56	4.77
Thailand	42	4.17	27	4.32	51	4.15	39	4.36	67	2.61	11	5.42
Trinidad and Tobago	50	3.86	58	3.17	44	4.47	69	3.28	49	3.18	24	5.18
Tunisia	49	3.86	68	2.93	47	4.38	48	4.02	69	2.59	13	5.39
Turkey	57	3.73	44	3.71	63	3.79	50	4.00	55	2.97	103	4.19
Uganda	112	2.68	120	2.02	87	3.13	108	1.89	116	1.59	59	4.75
Ukraine	78	3.24	98	2.44	84	3.24	62	3.54	52	3.06	115	3.94
United Arab Emirates	27	4.69	5	5.50	49	4.34	32	4.79	36	3.76	28	5.08
United Kingdom	6	5.32	4	5.65	11	5.85	16	6.18	9	5.46	127	3.44
United States	1	5.58	2	6.34	19	5.45	6	6.74	13	5.23	105	4.16
Uruguay	71	3.37	111	2.21	66	3.71	75	3.07	56	2.97	43	4.88
Uzbekistan	98	2.90	80	2.68	73	3.47	130	1.04	99	1.95	12	5.39
Venezuela	82	3.21	71	2.90	112	2.66	76	3.03	68	2.61	47	4.85
Vietnam	92	2.98	83	2.65	78	3.38	124	1.25	88	2.15	7	5.47
Zambia	118	2.60	96	2.47	103	2.80	112	1.79	113	1.66	96	4.27
Zimbabwe	113	2.67	123	1.98	97	2.88	105	1.95	119	1.56	39	4.99

Table 4: The Travel & Tourism Competitiveness Index: Human, cultural, and natural resources

Country/Economy	T&T HUMAN, CULTURAL, AND NATURAL RESOURCES		PILLARS							
	Rank	Score	11. Human resources		12. Affinity for Travel & Tourism		13. Natural resources		14. Cultural resources	
			Rank	Score	Rank	Score	Rank	Score	Rank	Score
Albania	71	3.85	58	5.03	6	6.32	130	1.87	75	2.17
Algeria	98	3.52	96	4.64	117	4.16	97	2.64	55	2.65
Argentina	27	4.50	60	5.01	74	4.69	12	5.01	41	3.29
Armenia	94	3.59	79	4.87	43	5.05	107	2.35	79	2.11
Australia	1	5.61	14	5.71	63	4.82	4	5.72	5	6.20
Austria	7	5.16	19	5.62	23	5.45	37	4.00	11	5.59
Azerbaijan	105	3.44	54	5.04	69	4.75	110	2.31	99	1.66
Bahrain	69	3.88	49	5.06	32	5.27	127	1.97	43	3.22
Bangladesh	126	3.07	107	4.26	125	3.95	100	2.61	109	1.44
Barbados	46	4.26	38	5.26	2	6.57	117	2.20	46	3.02
Belgium	22	4.56	18	5.64	44	5.02	119	2.19	15	5.38
Benin	115	3.36	110	4.12	83	4.63	54	3.34	114	1.37
Bolivia	60	4.02	98	4.60	116	4.18	15	4.86	62	2.45
Bosnia and Herzegovina	117	3.33	106	4.27	93	4.50	120	2.19	70	2.37
Botswana	103	3.45	124	3.36	58	4.85	31	4.20	113	1.37
Brazil	6	5.21	66	4.98	94	4.48	3	5.81	12	5.58
Bulgaria	31	4.48	59	5.01	16	5.67	59	3.22	29	4.01
Burkina Faso	127	3.01	123	3.42	104	4.40	67	3.09	127	1.14
Burundi	122	3.20	125	3.30	17	5.62	83	2.87	128	1.02
Cambodia	86	3.69	108	4.26	11	5.83	53	3.42	120	1.26
Cameroon	120	3.25	117	3.83	121	4.06	38	3.92	123	1.21
Canada	10	5.07	10	5.79	68	4.76	16	4.78	21	4.96
Chad	129	2.69	126	3.19	129	3.84	91	2.73	129	1.02
Chile	54	4.14	36	5.29	96	4.46	52	3.49	39	3.30
China	13	4.81	48	5.07	126	3.92	8	5.25	19	5.01
Colombia	38	4.35	67	4.97	89	4.56	5	5.50	68	2.37
Costa Rica	24	4.52	27	5.45	21	5.49	7	5.36	92	1.80
Croatia	32	4.43	50	5.05	7	6.25	68	3.08	37	3.35
Cyprus	40	4.34	63	4.99	5	6.35	106	2.37	32	3.67
Czech Republic	25	4.51	30	5.35	61	4.83	82	2.87	20	4.97
Denmark	28	4.49	3	6.11	84	4.62	63	3.12	27	4.13
Dominican Republic	67	3.89	86	4.79	15	5.69	50	3.50	102	1.60
Ecuador	58	4.05	100	4.52	103	4.41	14	4.90	69	2.37
Egypt	70	3.86	82	4.83	31	5.28	86	2.83	58	2.52
El Salvador	121	3.25	64	4.98	102	4.41	122	2.11	106	1.48
Estonia	49	4.22	33	5.33	18	5.59	43	3.79	74	2.18
Ethiopia	92	3.60	122	3.52	107	4.34	34	4.12	65	2.43
Finland	14	4.78	6	5.90	100	4.42	57	3.24	13	5.56
France	12	4.85	25	5.50	85	4.62	47	3.61	10	5.67
Gambia, The	97	3.53	104	4.35	19	5.56	95	2.67	104	1.53
Georgia	85	3.70	47	5.07	37	5.15	116	2.22	71	2.36
Germany	9	5.13	24	5.50	72	4.74	30	4.26	6	6.01
Greece	18	4.66	43	5.11	39	5.12	75	3.02	16	5.38
Guatemala	55	4.12	91	4.77	48	4.97	19	4.69	81	2.06
Guyana	93	3.60	77	4.87	47	4.98	65	3.10	110	1.44
Honduras	62	3.96	90	4.77	41	5.10	29	4.31	98	1.68
Hong Kong SAR	42	4.31	8	5.83	14	5.70	55	3.30	67	2.42
Hungary	50	4.21	57	5.03	108	4.33	90	2.74	23	4.75
Iceland	36	4.40	4	6.11	24	5.44	101	2.57	36	3.49
India	26	4.50	93	4.75	88	4.57	13	4.94	31	3.73
Indonesia	53	4.17	34	5.31	56	4.88	26	4.42	80	2.08
Ireland	41	4.31	11	5.77	51	4.95	113	2.25	26	4.28
Israel	59	4.02	20	5.62	59	4.85	64	3.11	60	2.50
Italy	15	4.74	39	5.22	67	4.76	60	3.17	8	5.81
Jamaica	66	3.92	69	4.95	4	6.43	99	2.62	100	1.66
Japan	16	4.73	12	5.74	128	3.87	40	3.90	14	5.38
Jordan	64	3.92	70	4.95	9	6.11	87	2.81	91	1.81
Kazakhstan	112	3.39	55	5.03	79	4.65	115	2.23	101	1.63
Kenya	77	3.76	105	4.33	60	4.84	24	4.52	116	1.36
Korea, Rep.	29	4.49	9	5.83	112	4.31	80	2.90	22	4.94
Kuwait	119	3.31	32	5.34	119	4.07	125	2.06	94	1.77
Kyrgyz Republic	102	3.47	92	4.76	26	5.38	102	2.53	125	1.20
Latvia	82	3.75	51	5.05	66	4.79	78	2.98	76	2.17
Lesotho	130	2.61	129	2.92	109	4.33	128	1.97	122	1.22
Libya	106	3.43	99	4.52	105	4.37	114	2.24	56	2.61
Lithuania	74	3.79	53	5.04	52	4.94	92	2.71	63	2.44

(Cont'd.)

Table 4: The Travel & Tourism Competitiveness Index: Human, cultural, and natural resources (cont'd.)

Country/Economy	T&T HUMAN, CULTURAL, AND NATURAL RESOURCES		PILLARS							
	Rank	Score	11. Human resources		12. Affinity for Travel & Tourism		13. Natural resources		14. Cultural resources	
			Rank	Score	Rank	Score	Rank	Score	Rank	Score
Luxembourg	35	4.41	26	5.48	12	5.79	71	3.05	38	3.34
Macedonia, FYR	81	3.75	71	4.94	75	4.69	85	2.84	57	2.52
Madagascar	124	3.16	113	4.09	110	4.32	74	3.02	124	1.20
Malaysia	23	4.55	22	5.53	22	5.47	18	4.70	59	2.50
Mali	116	3.36	120	3.61	55	4.88	77	2.99	83	1.97
Malta	43	4.28	40	5.18	8	6.22	129	1.88	30	3.86
Mauritania	125	3.11	115	3.94	99	4.43	93	2.70	115	1.36
Mauritius	76	3.78	56	5.03	3	6.47	126	2.01	103	1.59
Mexico	19	4.62	52	5.05	86	4.59	25	4.44	25	4.43
Moldova	110	3.39	88	4.77	29	5.29	124	2.07	111	1.43
Mongolia	91	3.60	85	4.79	35	5.23	66	3.09	117	1.30
Montenegro	45	4.27	76	4.88	1	6.69	69	3.08	66	2.43
Morocco	72	3.81	95	4.67	25	5.43	118	2.19	48	2.96
Mozambique	128	2.97	130	2.92	92	4.51	61	3.16	118	1.28
Namibia	113	3.38	127	2.99	33	5.27	42	3.81	108	1.47
Nepal	99	3.51	116	3.84	78	4.67	35	4.11	112	1.43
Netherlands	21	4.58	16	5.68	76	4.68	88	2.78	18	5.16
New Zealand	17	4.70	21	5.62	34	5.25	28	4.33	33	3.59
Nicaragua	87	3.67	94	4.75	71	4.75	45	3.72	107	1.48
Nigeria	123	3.19	112	4.09	118	4.11	70	3.06	105	1.50
Norway	20	4.60	17	5.67	95	4.46	73	3.03	17	5.25
Oman	96	3.54	74	4.92	127	3.91	84	2.87	61	2.47
Pakistan	109	3.39	109	4.21	122	4.04	72	3.04	72	2.28
Panama	47	4.25	89	4.77	50	4.96	6	5.44	89	1.84
Paraguay	118	3.32	103	4.41	124	3.96	62	3.14	95	1.75
Peru	33	4.43	78	4.87	97	4.46	10	5.17	42	3.22
Philippines	78	3.75	61	5.00	65	4.81	58	3.23	82	1.98
Poland	34	4.42	41	5.18	120	4.06	46	3.72	24	4.72
Portugal	11	4.93	37	5.26	42	5.05	81	2.89	2	6.52
Puerto Rico	80	3.75	81	4.84	10	6.11	109	2.32	96	1.72
Qatar	65	3.92	23	5.51	49	4.97	121	2.16	45	3.04
Romania	73	3.79	68	4.96	101	4.42	96	2.67	44	3.12
Russian Federation	39	4.35	72	4.93	111	4.32	22	4.58	34	3.57
Saudi Arabia	107	3.43	83	4.82	123	3.99	44	3.75	126	1.16
Senegal	108	3.43	111	4.11	115	4.21	51	3.50	87	1.89
Serbia	88	3.64	45	5.10	98	4.44	112	2.27	52	2.73
Singapore	37	4.39	1	6.19	13	5.76	98	2.63	47	2.99
Slovak Republic	51	4.19	29	5.39	77	4.68	36	4.01	53	2.69
Slovenia	61	3.98	35	5.30	53	4.94	76	3.01	54	2.66
South Africa	52	4.18	118	3.81	45	5.02	21	4.60	40	3.30
Spain	4	5.33	31	5.34	46	4.99	32	4.19	1	6.80
Sri Lanka	63	3.95	62	4.99	64	4.82	49	3.55	64	2.44
Suriname	68	3.88	101	4.49	106	4.35	41	3.84	50	2.85
Sweden	8	5.15	15	5.70	82	4.64	39	3.92	3	6.36
Switzerland	3	5.39	2	6.17	40	5.12	23	4.53	9	5.76
Syria	95	3.55	97	4.60	27	5.36	123	2.10	77	2.15
Taiwan, China	79	3.75	13	5.72	73	4.70	103	2.44	78	2.13
Tajikistan	111	3.39	87	4.78	91	4.52	56	3.24	130	1.01
Tanzania	48	4.23	119	3.75	28	5.33	1	6.14	97	1.71
Thailand	30	4.49	65	4.98	20	5.51	20	4.63	51	2.83
Trinidad and Tobago	104	3.44	75	4.90	113	4.31	111	2.30	73	2.27
Tunisia	57	4.08	28	5.45	30	5.28	94	2.69	49	2.91
Turkey	44	4.28	73	4.92	38	5.14	79	2.97	28	4.08
Uganda	83	3.74	114	3.95	70	4.75	11	5.01	121	1.25
Ukraine	100	3.51	80	4.87	62	4.83	104	2.39	84	1.95
United Arab Emirates	89	3.62	42	5.15	36	5.18	108	2.33	90	1.81
United Kingdom	5	5.26	7	5.87	90	4.54	27	4.35	4	6.28
United States	2	5.52	5	5.91	114	4.29	2	6.04	7	5.83
Uruguay	56	4.09	46	5.09	54	4.93	89	2.78	35	3.55
Uzbekistan	101	3.51	44	5.10	81	4.65	105	2.37	86	1.90
Venezuela	75	3.78	102	4.44	130	3.51	9	5.21	85	1.94
Vietnam	84	3.71	84	4.80	87	4.58	48	3.58	88	1.86
Zambia	90	3.62	121	3.58	57	4.85	17	4.76	119	1.27
Zimbabwe	114	3.37	128	2.93	80	4.65	33	4.14	93	1.78

qualified labor easier there than in France, which is ranked a low 86th on this pillar.

The United States is ranked 7th. The country places 1st for the overall business environment and infrastructure, and 2nd for the country's human, cultural, and natural resources. In particular, the United States has an excellent air transport infrastructure (ranked 2nd), and high-quality tourism and ICT infrastructure. Its natural resources are ranked a high 2nd worldwide, with many protected areas and many World Heritage natural sites, although a perception exists that the environment is not being sufficiently protected (ranked 100th for environmental sustainability). Safety and security, ranked 119th, is also of concern: as well as some concerns about safety from crime, the country has one of the highest rates of road traffic incidents out of all countries covered.

Canada is ranked 9th, with its natural resources providing a key strength. The country's eight World Heritage natural sites place it 4th internationally. Canada's air transport infrastructure is second to none, and it also gets good marks for its tourism and ICT infrastructure, facilitating the online T&T environment. Canada receives a better assessment for its efforts toward ensuring environmental sustainability than the United States, and it also gets much better marks for the safety and security environment than its southern neighbor.

Greece is ranked 22nd, with rich cultural resources (ranked 16th), excellent health and hygiene (ranked 16th overall), and top-notch tourism infrastructure (9th). Greece is second to none in terms of the country's overall prioritization of Travel & Tourism. Further, there is a strong national affinity for tourism compared with many other European countries, including a generally open and positive attitude toward tourists (17th). The country's overall ranking is held back, however, by policy rules and regulations that are not entirely supportive of the sector's development (ranked 61st), with stringent rules governing FDI and foreign ownership restrictions as well as a long time and high cost involved in starting a new company. Another area of weakness is the country's ground transport infrastructure, which is less efficient than in many other European countries. The availability of qualified labor (ranked 62nd) is another area of concern, with, for example, insufficient training available in the country, and stringent hiring and firing practices.

Italy, despite being endowed with the most World Heritage cultural sites in the world, ranks a lower 28th in the TTCI ranking. As well as its cultural richness, Italy's strengths lie in areas such as the health and hygiene of the country (19th) and its excellent tourism infrastructure (4th). However, it faces a number of challenges that bring its overall rating down. These include policy rules and regulations, where Italy ranks 57th because of its very strong foreign ownership restrictions (ranked 102nd) and rules governing FDI (109th). Further, the government is not seen to be prioritizing the sector (ranked 97th). In addition, ground transport

infrastructure requires upgrading, and there are some safety and security concerns in the country (81st).

Croatia, a country aiming to join the European Union in the coming years, is ranked a reasonable 34th, on a par with countries such as Malaysia and Hungary and well ahead of several EU members. It is endowed with a number of cultural and natural World Heritage sites, and is ranked a high 7th in terms of its overall affinity for Travel & Tourism. In addition, the country's tourism-specific infrastructure is ranked a high 10th out of all 130 countries. On the other hand, in order to improve the sector's competitiveness further, a goal will be to further upgrade transport infrastructure, particularly railroads and ports, and to bring policy rules and regulations in the country more in line with those that are needed for developing the sector.

Turkey is ranked 54th in the TTCI. The country certainly benefits from its rich cultural heritage, with nine World Heritage cultural sites. However, its overall T&T competitiveness is held back by worries about safety and security (79th, particularly related to terrorism and road safety), health and hygiene (62nd), and ground transport infrastructure inadequacies. In addition, protecting the country's natural resources could be further prioritized.

Russia is ranked 64th overall. The country gets relatively high marks for natural resources (22nd) and cultural resources (34th), due in particular to its many World Heritage sites. It also has a quite well developed air transport infrastructure (33rd). However, ground transport infrastructure (83rd) and tourism infrastructure (66th) get lower marks, with few available hotel rooms in particular. Safety and security issues are also of serious concern (127th), with a high level of crime and violence, a lack of trust in the police to provide protection from crime, and a high rate of road traffic accidents. Most strikingly, Russia is assessed as having a very disadvantageous policy environment (110th) due, for example, to extremely high foreign ownership restrictions, property rights that are not well protected, and visa requirements for visitors from many countries. Environmental sustainability, ranked 117th, is also an area of concern. More generally, the sector is not seen to be a priority of the government, ranked a low 125th overall.

Asia and Oceania

Australia is the highest ranked country from Asia and Oceania. The only one in the top 10, it is ranked 4th, just behind Germany and ahead of Spain. Australia is ranked 1st worldwide for the number of World Heritage natural sites, and 5th for its cultural resources. Given the importance of the natural environment for much of its leisure tourism, it is notable that the stringency and enforcement of its environmental regulations are well assessed. Given the country's distance from other continents, and the related importance of domestic air travel to overcome the large distances between major sites, its

competitiveness is also buttressed by excellent air transport infrastructure (ranked 3rd), as well as good general tourism infrastructure. Australia also benefits from the relatively strong government prioritization of the tourism sector and effective destination-marketing campaigns.

Within the region, Australia is joined in the top 20 by **Hong Kong** (14th) and **Singapore** (16th). These economies have excellent infrastructures: their ground transport infrastructures are assessed as the top two in the world, and their air transport infrastructures also get high marks. They also benefit from well-qualified labor to work in the sector, both ranked among the top four in this area. With regard to the policy environment, they hold the top two places out of all countries, with rules and regulations that are extremely conducive to the development of their T&T industries (policies facilitating foreign ownership and FDI, well-protected property rights, few visa restrictions). Further, they are among the safest countries of all assessed with regard to crime and security. Hong Kong is unsurpassed for the quality of health and hygiene, and Singapore is ranked 5th in the overall prioritization of Travel & Tourism.

Japan is ranked 23rd in the TTCI, with good marks for its cultural resources (ranked 14th) attributable to its many World Heritage cultural sites and the large number of international fairs and exhibitions held in the country. The ground transport infrastructure is among the best in the world, especially railroads, and Japan continues to be a leader in the area of education and training. However, Japan ranks third from the bottom for the affinity of the country for Travel & Tourism (128th). Further, the sector is not perceived to be a priority for the government (ranked 87th).

Korea is ranked 31st, just ahead of Malaysia. Korea's strengths lie in the quality of its human resources (ranked 9th), its excellent ground transport and ICT infrastructure (ranked 15th and 6th, respectively), and its rich cultural heritage. On the other hand, its overall T&T competitiveness is held back by a weak affinity for Travel & Tourism (ranked a low 112th), its relative costliness as a destination (ranked 106th), and its underdeveloped tourism infrastructure (ranked 70th).

Malaysia is ranked 32nd, with its rich natural resources (ranked 18th) and good ground transport infrastructure. The country also benefits from excellent price competitiveness (ranked 3rd), with low comparative hotel and fuel prices, low ticket taxes and airport charges, and a favorable tax regime. Malaysia's policy environment is measured as highly conducive to the development of the sector (ranked 12th), and the government is prioritizing Travel & Tourism; it also has an excellent evaluation for its destination-marketing campaigns (ranked 7th). With regard to weaknesses, health and hygiene indicators lag behind those of many other countries in the region, with, in particular, a low physician density (placing the country 93rd).

Thailand is ranked 42nd in the TTCI. It is endowed with rich natural resources and a strong affinity for Travel & Tourism (both ranked 20th), with a very friendly attitude of the population toward tourists (ranked 10th). This is buttressed by the sector's strong prioritization by the government (ranked 12th) with, similar to Malaysia, excellent destination-marketing campaigns and strong price competitiveness. However, some weaknesses remain: despite the prioritization of the sector by the government, some aspects of the regulatory environment—such as stringent foreign ownership restrictions, visa restrictions for many travelers, and the long time required for starting a business in the country—are not particularly conducive to developing the sector (ranked 52nd).

China is ranked somewhat lower, at 62nd place. China has many clear strengths: it is ranked 3rd for its World Heritage natural sites and 5th for its cultural sites, demonstrating the rich cultural and natural heritage of the country. In addition, the country is ranked 17th in price competitiveness. However, there are some weaknesses pulling the country's ranking down. China has a relatively good air transport infrastructure (ranked 36th), but ground transport infrastructure gets middling marks (61st), and its tourism infrastructure remains highly underdeveloped (ranked 119th), with very few major international car rental companies operating in the country, few hotel rooms available, and few ATMs. In addition, China has a policy environment that is not conducive to T&T development (ranked a low 89th, just ahead of Mozambique), with property rights that are not sufficiently protected, strong foreign ownership restrictions, and visa requirements for most visitors. Furthermore, policies related to environmental sustainability get low marks (110th), with the government not seen to be prioritizing the development of the sector in a sustainable way. There are also some safety and security concerns (121st), as well as issues related to health and hygiene (99th), with access to improved sanitation and drinking water that is low by international standards. However, on a positive note, China does seem to be prioritizing the sector to a certain extent (36th), with active participation in most international tourism fairs.

India is ranked 65th overall. As with China, India is well assessed for its natural resources (ranked 13th) and cultural resources, with many World Heritage sites, both natural and cultural. The country also benefits from good price competitiveness, ranked 20th overall, despite somewhat high comparative hotel prices. India also has quite a good air transport network (ranked 35th), particularly given the country's stage of development, and a reasonable ground transport infrastructure (ranked 39th). However, the tourism infrastructure remains somewhat underdeveloped (ranked 80th), with very few hotel rooms per capita by international comparison and low ATM penetration. Further, despite government and industry efforts to promote the country abroad (India is

ranked 22nd with regard to tourism fair attendance) and the exposure given to recent promotional campaigns, the assessment of marketing and branding to attract tourists remains mediocre (ranked 51st). Another area of concern is the policy environment, ranked 102nd, with much time and cost for starting a business, bilateral Air Service Agreements that are not assessed as open, and visas required for most visitors.

Indonesia is ranked lower, at 80th overall. In terms of strengths, Indonesia places 26th for its natural resources, with several World Heritage natural sites and the richness of its fauna as measured by the known species in the country. Further, the country is ranked 1st overall on price competitiveness in the T&T industry because of very reasonable hotel prices, low ticket taxes and airport charges, favorable fuel prices, and overall relatively low prices in the country. In addition, it is ranked 11th for the national prioritization of Travel & Tourism.

However, these strengths are held back by weaknesses such as underdeveloped infrastructure in the country, including to a certain extent air transport (61st), and especially ground transport (98th) and tourism infrastructure (109th). There are also some concerns related to safety and security, particularly a lack of trust of police services and the prevalence of road traffic accidents.

The Philippines is ranked 81st, just behind Indonesia. Among the country's strengths are its natural resources: it is ranked 21st for the number of World Heritage natural sites and, with its rich fauna, is ranked 38th for the total known species in the country. The Philippines also benefits from excellent price competitiveness (ranked 9th), with low prices overall, particularly hotel prices, and low ticket taxes and airport charges. There are also some aspects of the policy rules and regulations regime that are conducive to the development of the sector, such as few visa requirements for foreign visitors (ranked 3rd) and bilateral Air Service Agreements that are assessed as comparatively open (27th), although other areas such as the protection of property rights, rules related to foreign investment, and the difficulty of starting a business in the country remain a challenge. Other matters of concern are safety and security (ranked 113th), health and hygiene levels (91st), and a transport and tourism infrastructure that requires upgrading.

Latin America and the Caribbean

Barbados is the highest-ranked country in the LAC region, at 29th overall. Barbados is ranked 2nd for the country's affinity for Travel & Tourism, with a positive attitude toward tourists and toward the value of tourism in the country. The government is prioritizing the sector to a very high degree (ranked 2nd), spending a high percentage of GDP on the sector and ensuring effective destination-marketing campaigns. Further, the country has a regulatory environment that is quite conducive to the development of the sector, requiring few visitors to

have visas to enter the country and with open bilateral Air Service Agreements.

Costa Rica, ranked 44th, is second in the region. The country gets excellent marks for its natural resources (ranked 7th), with several World Heritage sites, a high percentage of protected areas, and the country's very diverse fauna. Given the importance of the natural environment for the country's tourism industry, it is notable that it ranks a reasonably high 32nd overall for environmental sustainability. However, safety and security remains a concern (66th). Further, although its tourism infrastructure is well developed (29th), with an excellent presence of major car rental companies and abundant hotel rooms, ground transport infrastructure requires upgrading (113th), particularly roads and ports, making travel in the country somewhat difficult.

Puerto Rico enters the TTCI for the first time this year, ranked 46th. Puerto Rico has a number of strengths, which include the strong affinity of the country toward Travel & Tourism (ranked 10th), a policy environment that is conducive to the development of the sector (15th), and efforts to ensure environmental sustainability (14th). Puerto Rico's transport infrastructure is also well assessed, particularly the air transport infrastructure (ranked 11th). On the other hand, its T&T competitiveness could be strengthened by upgrading its tourism-specific infrastructure (54th) as well as its ICT infrastructure (50th). Other areas of concern include safety and security in the country (55th) and health and hygiene issues (60th).

Brazil is ranked 49th overall. The country is ranked 3rd for its natural resources and 12th for its cultural resources, with many World Heritage sites, a great proportion of protected land area, and very rich fauna. This is buttressed by some focus on environmental sustainability (ranked 37th). However, the ground transport network remains underdeveloped with the quality of roads, ports, and railroads ranked 110th, 116th, and 87th, respectively. Safety and security continues to be of serious concern, ranked 128th overall, just behind Pakistan and Russia. The country also suffers greatly from a lack of price competitiveness (92nd), attributable in part to high ticket taxes and airport charges in the country. More generally, the overall policy environment is not particularly conducive to the development of the sector, ranked 95th, with discouraging rules on FDI and much time required for starting a business.

Chile is ranked 51st. The country has rich cultural resources, with five World Heritage cultural sites, and it has several international fairs and exhibitions held in the country. In addition, policy rules and regulations are conducive to the development of the T&T sector (18th), with few foreign ownership restrictions, a liberal visa regime, and open bilateral Air Service Agreements. The country also benefits from good safety and security by regional standards (36th). However, Chile's T&T competitiveness would be strengthened by upgrading its

transport and tourism infrastructure and a greater focus on developing the industry in an environmentally sustainable way.

Mexico, in 55th place, gets quite high marks for its natural and cultural resources (both ranked 25th), with many World Heritage sites. This is reinforced by the overall prioritization of the sector in the country (31st), with country-level participation at many T&T fairs and effective marketing and branding campaigns for attracting tourists. Some areas requiring attention are the tourism infrastructure (49th) and especially the ground transport infrastructure (82nd). In addition, Mexico is ranked a low 83rd for its price competitiveness, due in particular to very high ticket taxes and airport charges (ranked a low 124th overall). Safety and security also continues to be a major concern, ranked 122nd with high levels of crime and violence, a police force that cannot be relied on to provide protection from crime, and many road traffic accidents.

Argentina is ranked a bit lower than Mexico, at 58th place. Argentina is among the highest-ranked countries for its natural resources (12th), with a number of World Heritage sites, a natural environment that is evaluated as pristine, and very rich fauna. Price competitiveness is also in Argentina's favor (41st) with low comparative hotel and fuel prices as well as a generally competitive price level overall. The country also benefits from a relatively high airport density, abundant seat kilometers, and several operating airlines, although the quality of air transport is highlighted as a problem area (ranked 113th). Some aspects of the quality of human resources are also strengths, such as the high primary enrollment rate and the ease of hiring foreign labor. However, a number of weaknesses are pulling the country's overall score down. For example, several government policies—such as weak property rights (ranked 127th) and stringent rules on FDI (ranked 119th)—are not supporting the development of the sector. Further, environmental regulation is not sufficiently stringent (ranked 111th) or well enforced (ranked 120th), which is of concern given the importance of natural resources for the country's tourism industry.

Venezuela, despite its top-10 status for its endowment of natural resources, is ranked much lower than most other countries in the region, at 103rd. Among the significant weaknesses are a lack of safety and security (ranked 125th), a low prioritization of the tourism industry (123rd), and the lowest rank of all countries regarding the overall national affinity for Travel & Tourism (130th). In addition, infrastructure is in need of upgrading, particularly ground transport infrastructure (ranked 112th). The policy environment is also not very conducive to the development of the T&T sector. Property rights are not well protected in the country, and FDI is also not encouraged (both these indicators are ranked second to last, or 129th, in both cases just ahead of Zimbabwe).

Middle East and North Africa

Israel is the highest ranked country in the MENA region, at 35th overall. The country's human resources base is well evaluated (20th), providing healthy and well-trained people to work in the T&T sector. Further, infrastructure is quite well developed compared with those of other countries in the region, especially its ICT infrastructure. Israel's regulatory environment, ranked 30th, is conducive to the development of the sector, with well protected property rights and low foreign ownership restrictions. And the country's environmental regulation also gets relatively good marks in terms of both stringency and enforcement. But although Israel gets excellent marks related to health and hygiene (ranked 8th), with one of the highest physician densities in the world, safety and security continues to be a major concern, placing the country at 60th, primarily related to concerns about terrorism (ranked 127th, ahead of just Colombia, Sri Lanka, and Nepal).

Tunisia is ranked 39th, with an excellent assessment of the prioritization of Travel & Tourism (8th)—similar to countries such as Spain and Switzerland—with high government spending on the sector, effective destination-marketing campaigns, and attendance at most major international tourism fairs. Further, unlike some other countries in the region, Tunisia is perceived as relatively safe from crime and violence (ranked 25th), including terrorism. In addition, price competitiveness is a positive attribute, ranked 13th, with very competitive hotel prices, reasonable fuel levels, and reasonable taxation, although ticket taxes and airport charges are comparatively onerous. Health and hygiene also remains an area of concern (75th), with a relatively low physician density and a low concentration of hospital beds.

The United Arab Emirates (UAE) also ranks among the top third of all countries at 40th, close behind Israel and Tunisia. While the UAE is not endowed with rich natural and cultural resources (108th and 90th, respectively), it does very well in several other areas captured by the Index. For example, the country exudes an extremely positive attitude toward foreign travelers (6th) and is also seen as safe from crime and violence (ranked 14th). The country also does comparatively well with regard to price competitiveness, ranked 28th in this area, despite a very high price level. This is the result of very low ticket taxes and airport charges, low taxation more generally, and low fuel price levels in the country. The UAE's infrastructure also gets good marks, particularly its air transport infrastructure, which is ranked a high 5th out of all countries assessed. The government is seen as prioritizing the sector strongly (ranked 4th), carrying out very effective destination-marketing campaigns (ranked 1st) and ensuring the presence of the country at major T&T fairs internationally. On the other hand, rules and regulations could be adapted to better support the sector's development, which is ranked 81st overall because of foreign ownership

restrictions, visa requirements for many visitors, and much time and cost required for starting a business in the country, for example.

Egypt, a country rich in cultural heritage (with six World Heritage cultural sites), ranks 66th overall in the TTCI. In addition to its cultural attributes, it benefits from excellent price competitiveness, ranked 2nd, just behind Indonesia. This is attributable to overall low comparative prices, including fuel prices and hotel room prices, as well as relatively low ticket taxes and airport charges. Further, there is a national prioritization of the sector, with the government ensuring both relatively high spending on Travel & Tourism and the country's presence at major tourism fairs. On the other hand, the country's infrastructure is somewhat underdeveloped, particularly its tourism infrastructure (79th) and ICT infrastructure (87th). An upgrading of the quality of the country's human resources available to work in the sector, ranked 82nd, would also improve the country's overall T&T competitiveness.

Morocco is ranked 67th, just behind Egypt. Morocco also receives a good evaluation for its cultural resources, being ranked a high 19th for the number of World Heritage cultural sites in the country. In addition, the government is seen to be prioritizing the development of the sector, and its policy rules and regulations are indeed somewhat supportive of the industry (ranked 40th), with a favorable visa regime and relative ease of setting up a business in the country. The government is also seen to be making efforts to develop the T&T sector in a sustainable way, protecting the natural environment. In order to improve the industry's competitiveness further, efforts should be made to improve health and hygiene levels in the country and upgrade the educational system, as well as make further improvements to the country's transport and tourism infrastructure.

Sub-Saharan Africa

Mauritius is the highest-ranked country in the sub-Saharan African region at 41st overall, 19 places higher than the second-ranked country, South Africa. The Mauritian government is unsurpassed in terms of the prioritization of the sector, with very high government spending on the tourism industry (ranked 3rd), and ensuring excellent destination-marketing campaigns to attract tourists (ranked 8th). Along similar lines, Mauritius is ranked 3rd for the country's overall affinity for Travel & Tourism, with the sector representing an important part of the economy and the general attitude of the population to foreign travelers being extremely welcoming. The country's tourism infrastructure is quite well developed, particularly by regional standards, with a high concentration of hotel rooms and many major car rental companies operating in the country. Mauritius also benefits from price competitiveness (ranked 19th), with relatively low prices overall and taxation that is not overly burdensome. Safety and security levels are also

very good by regional standards (ranked 33rd), and are on a par with countries such as Canada and the Netherlands. In terms of challenges, there are some areas that could be addressed in order to improve Mauritius' competitiveness. For example, some aspects of the policy environment could be made more advantageous, such as easing up on foreign ownership restrictions and more open bilateral Air Service Agreements. And although the government is seen to be making an effort to develop the industry in a sustainable way (ranked 9th), this could be backed up by more stringent and clearer environmental regulations (ranked 50th).

South Africa, ranked 60th, is the region's second-strongest performer, and the only other country in the region within the top half of rankings. The country is ranked a high 21st for its natural resources, and 40th for its cultural resources, based on its many World Heritage sites, its rich fauna, and the many international fairs and exhibitions held in the country. South Africa also benefits from price competitiveness, with reasonably priced hotel rooms and a favorable tax regime. Infrastructure in South Africa is also well developed, particularly for the region, with air transport infrastructure ranked 40th and a particularly good assessment of road quality (38th). Overall, policy rules and regulations are conducive to the sector's development (ranked 36th), with well-protected property rights and few visa requirements for visitors. The country also gets good marks for environmental sustainability (ranked 35th). And the government prioritizes the development of the T&T sector as a whole, through, for example, effective destination marketing (ranked 21st). However, there are also some areas of weakness that have brought down the country's overall ranking. Safety and security is of serious concern (ranked 123rd), with the costs of crime and violence in particular ranked a low 125th. The country also has weaknesses in the area of health and hygiene, where it is ranked 82nd as a result of its low physician density (91st) and concerns about access to improved sanitation (84th) and drinking water (75th). Related to this, health indicators are extremely worrisome. South Africa's life expectancy is low, at 48 years, placing the country 117th overall, a ranking related in large part to the very high rates of communicable diseases such as HIV/AIDS. This is clearly an area requiring urgent attention to ensure the continuing availability of human resources for the T&T sector, as well as all sectors in the economy.

The Gambia, ranked 84th, is the next-most competitive economy in the region, closely followed by Botswana. Gambia's government places great priority on tourism (ranked 10th), with nearly 10 percent of its budget devoted to the sector (ranking the country 9th on this indicator). Further, developing the industry sustainably to protect the natural environment is also seen to be a priority for the government. In addition, Gambia benefits greatly from price competitiveness, ranked 1st out of all countries on the hotel price index

and 2nd for its overall low price levels. The country is also perceived to be relatively safe from crime and violence, another important feature. On the other hand, there are a number of areas requiring attention to increase Gambia's competitiveness. Although the ground transport infrastructure is somewhat developed by regional standards (ranked 64th), it could be upgraded. Efforts should also be made to improve the air transport infrastructure (90th) and general tourism infrastructure (102nd). Attention should also be placed on improving the health of the workforce and upgrading the educational system. Finally, policy rules and regulations are not conducive to the industry's development at present (ranked 93rd), with visas required for many visitors, property rights that are not perceived to be sufficiently protected, and much time and cost required for starting a business in the country.

Botswana is ranked 87th overall in the TTCI. The country, known for its beautiful natural parks, is ranked 31st out of all countries for its natural resources, with much protected land area (ranked 10th) and a lack of environmental damage. The country also benefits from excellent price competitiveness, where it is ranked 6th because of low ticket taxes and airport charges (14th) and a favorable tax regime in the country (17th). However, Botswana does face some challenges that lead to its rather low ranking overall. The policy regime is not extremely conducive to the development of the sector. Although the country does not have an onerous visa policy (21st), the country's bilateral Air Service Agreements are not evaluated as open (100th) and much time is required for starting a new business (108 days, placing the country 121st). Further, Botswana's transport infrastructure is somewhat underdeveloped, as well as its tourism infrastructure, with a low hotel room concentration (71st) and a limited presence of international car rental companies (74th). There are also some concerns in the area of health and hygiene, attributable to a very low physician density (102nd) and very limited access to improved sanitation (108th). Associated with this, the greatest comparative weakness relates to the health of the workforce, where life expectancy of just 35 years places the country last out of all 130 countries, in a tie with Lesotho. Botswana has the highest HIV prevalence rate of all countries covered.

Tanzania, ranked 88th, just after Botswana, is a country with some impressive strengths. The country is ranked 1st worldwide for the natural environment, with several World Heritage natural sites (ranked 10th) and so much protected land area as to place the country 4th on that indicator. This is buttressed by an important focus in the country on environmental sustainability (ranked 29th), particularly as it pertains to the development of this industry. There is also a general affinity of the population to Travel & Tourism (ranked 28th), and it is clearly seen to be an overall national priority (33rd). On the other hand, the policy environment could be more

supportive of the development of the sector, by ensuring more open bilateral Air Service Agreements (106th), pursuing a less stringent visa policy for visitors (67th), ensuring better protection of property rights (94th), and making it less costly to start a business (99th). Other issues of concern are security levels in the country, and a focus must be placed—as in most countries in the region—on improving the health of the workforce, upgrading the educational system, and improving all types of infrastructure on which the industry is dependent.

Looking further down in the rankings, **Zimbabwe** is ranked 117th overall. This is a low ranking for a country with such natural endowments as the famous Victoria Falls. Indeed, Zimbabwe is ranked 33rd for natural resources overall, with a number of World Heritage natural sites, much protected land area, and rich fauna. Despite these strengths, which have attracted tourists to Zimbabwe over the years, the Index mainly highlights the country's weaknesses in all of the other areas. The policy environment is among the worst in the world (ranked 128th), with rock bottom assessments for laws related to FDI and property rights (both ranked 130th). Safety and security is also a major concern, with high crime and violence and a lack of trust in the reliability of police services to provide protection from crime (123rd), reflecting the general breakdown in law and order in the country in recent years. There are also concerns related to human resources, with low enrollment rates in primary and secondary education by international standards, and among the worst health indicators in the world: life expectancy is just 37 years now in the country, placing it 128th. Better governance will be imperative to get the country back on track for improved T&T competitiveness.

Conclusions

This chapter has assessed the Travel & Tourism competitiveness of 130 economies, spanning all regions of the world, based on the World Economic Forum's Travel & Tourism Competitiveness Index. The TTCI represents our best efforts to capture the complex phenomenon of T&T competitiveness, demonstrating that a whole array of reforms and improvements in different areas are required for improving the T&T competitiveness of nations. This year we have improved upon the Index released for the first time last year, with a particular effort to better capture the importance of environmental sustainability for the sector's development.

By highlighting success factors and obstacles to T&T competitiveness in economies around the world, the TTCI is a tool that can be used to identify the competitive strengths of individual countries as well as the barriers that impede the development of the sector. It is our hope that it will be used as a platform for dialogue between the business community and national policymakers working together to improve the T&T

competitiveness of their respective economies, and thus contribute to improving the growth prospects and prosperity of their citizens.

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Notes

- 1 UNWTO 2007a.
- 2 These figures include direct and indirect effects. See UNWTO 2007c.
- 3 WTTC 2007.

Appendix A: Composition of the Travel & Tourism Competitiveness Index

This appendix provides details about the construction of the Travel & Tourism Competitiveness Index (TTCI). The TTCI is composed of three subindexes: the T&T regulatory framework subindex; the T&T business environment and infrastructure subindex; and the T&T human, cultural, and natural resources subindex. These subindexes are, in turn, composed of the 14 pillars of T&T competitiveness shown below: namely, policy rules and regulations, environmental sustainability, safety and security, health and hygiene, prioritization of Travel & Tourism, air transport infrastructure, ground transport infrastructure, tourism infrastructure, ICT infrastructure, price competitiveness in the T&T industry, human resources, affinity for Travel & Tourism, natural resources, and cultural resources. These pillars are calculated on the basis of both “hard data” and “Survey data.”

The Survey data comprise the responses to the World Economic Forum’s Executive Opinion Survey and range from 1 to 7; the hard data were collected from various sources, which are described in the Technical Notes and Sources section at the end of the Report. All of the data used in the calculation of the TTCI can be found in the Data Tables section of the Report.

The hard data indicators used in the TTCI are normalized to a 1-to-7 scale in order to align them with the Executive Opinion Survey’s results.¹

Each of the pillars has been calculated as an unweighted average of the individual component variables. The subindexes are then calculated as unweighted averages of the included pillars. In the case of the human resources pillar, which is itself composed of two subpillars (education and training and availability of qualified labor), the overall pillar is the unweighted average of the two subpillars. The overall TTCI is then the unweighted average of the three subindexes. The variables of each pillar and subpillar are described below. If a variable is one of hard data, this is indicated in parentheses after the description.

Subindex A: T&T Regulatory Framework

Pillar 1: Policy rules and regulations

- 1.01 Prevalence of foreign ownership
- 1.02 Property rights
- 1.03 Business impact of rules on FDI
- 1.04 Visa requirements (hard data)
- 1.05 Openness of bilateral Air Service Agreements (hard data)
- 1.06 Transparency of government policymaking
- 1.07 Time required to start a business (hard data)
- 1.08 Cost to start a business (hard data)

Pillar 2: Environmental sustainability

- 2.01 Stringency of environmental regulation
- 2.02 Enforcement of environmental regulation
- 2.03 Sustainability of T&T industry development
- 2.04 Carbon dioxide emissions (hard data)
- 2.05 Particulate matter concentration (hard data)
- 2.06 Threatened species (hard data)
- 2.07 Environmental treaty ratification (hard data)

Pillar 3: Safety and security

- 3.01 Business costs of terrorism
- 3.02 Reliability of police services
- 3.03 Business costs of crime and violence
- 3.04 Road traffic accidents (hard data)

Pillar 4: Health and hygiene

- 4.01 Physician density (hard data)
- 4.02 Access to improved sanitation (hard data)
- 4.03 Access to improved drinking water (hard data)
- 4.04 Hospital beds (hard data)

Pillar 5: Prioritization of Travel & Tourism

- 5.01 Government prioritization of the T&T industry
- 5.02 T&T government expenditure (hard data)
- 5.03 Effectiveness of marketing and branding to attract tourists
- 5.04 T&T fair attendance (hard data)

Subindex B: T&T Business environment and infrastructure

Pillar 6: Air transport infrastructure

- 6.01 Quality of air transport infrastructure
- 6.02 Available seat kilometers (hard data)
- 6.03 Departures per 1,000 population (hard data)
- 6.04 Airport density (hard data)
- 6.05 Number of operating airlines (hard data)
- 6.06 International air transport network (hard data)

Pillar 7: Ground transport infrastructure

- 7.01 Quality of roads
- 7.02 Quality of railroad infrastructure
- 7.03 Quality of port infrastructure
- 7.04 Quality of domestic transport network
- 7.05 Road density (hard data)

Pillar 8: Tourism infrastructure

- 8.01 Hotel rooms (hard data)
- 8.02 Presence of major car rental companies (hard data)
- 8.03 ATMs accepting Visa cards (hard data)

Pillar 9: ICT infrastructure

- 9.01 Extent of business Internet use
- 9.02 Internet users (hard data)
- 9.03 Telephone lines (hard data)
- 9.04 Broadband Internet subscribers (hard data)
- 9.05 Mobile telephone subscribers (hard data)

Pillar 10: Price competitiveness in the T&T industry

- 10.01 Ticket taxes and airport charges (hard data)
- 10.02 Purchasing power parity (hard data)
- 10.03 Extent and effect of taxation
- 10.04 Fuel price levels (hard data)
- 10.05 Hotel price index (hard data)

(Cont'd.)

Appendix A: Composition of the Travel & Tourism Competitiveness Index (cont'd.)

Subindex C: T&T Human, cultural, and natural resources

Pillar 11: Human resources

Education and training

- 11.01 Primary education enrollment (hard data)
- 11.02 Secondary education enrollment (hard data)
- 11.03 Quality of the educational system
- 11.04 Local availability of specialized research and training services
- 11.05 Extent of staff training

Availability of qualified labor

- 11.06 Hiring and firing practices
- 11.07 Ease of hiring foreign labor
- 11.08 HIV prevalence (hard data)²
- 11.09 Business impact of HIV/AIDS²
- 11.10 Life expectancy (hard data)

Pillar 12: Affinity for Travel & Tourism

- 12.01 Tourism openness (hard data)
- 12.02 Attitude of population toward foreign visitors
- 12.03 Extension of business trips recommended

Pillar 13: Natural resources

- 13.01 Number of World Heritage natural sites (hard data)
- 13.02 Protected areas (hard data)
- 13.03 Quality of the natural environment
- 13.04 Total known species (hard data)

Pillar 14: Cultural resources

- 14.01 Number of World Heritage cultural sites (hard data)
- 14.02 Sports stadiums (hard data)
- 14.03 Number of international fairs and exhibitions (hard data)

Notes

- 1 The standard formula for converting each hard data variable to the 1-to-7 scale is

$$6 \times \left(\frac{\text{country score} - \text{sample minimum}}{\text{sample maximum} - \text{sample minimum}} \right) + 1$$

The *sample minimum* and *sample maximum* are the lowest and highest scores of the overall sample, respectively. For those hard data variables for which a higher value indicates a worse outcome (e.g., road traffic accidents, fuel price levels), we rely on a normalization formula that, in addition to converting the series to a 1-to-7 scale, reverses it, so that 1 and 7 still correspond to the worst and best possible outcomes, respectively:

$$-6 \times \left(\frac{\text{country score} - \text{sample minimum}}{\text{sample maximum} - \text{sample minimum}} \right) + 7$$

In some instances, adjustments were made to account for extreme outliers in the data.

- 2 The impact of HIV/AIDS on T&T competitiveness depends not only on its respective incidence rate, but also on how costly it is for business. Therefore, in order to estimate the impact of HIV/AIDS, we combine its incidence rate with the Survey question on its perceived cost to businesses. To combine these data we first take the ratio of each country's incidence rate relative to the highest incidence rate in the whole sample. The inverse of this ratio is then multiplied by each country's score on the related Survey question. This product is then normalized to a 1-to-7 scale. Note that countries with zero reported incidence receive a 7, regardless of their scores on the related Survey question.