

Preface

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Over recent decades, Travel & Tourism has taken its place among the key industries in the world economy, now accounting for a significant share of global gross domestic product (GDP) and employment, and providing an opportunity for developing countries to move up the value chain toward the production of higher value added services. Given the importance of the Travel & Tourism (T&T) industry for industrialized and developing countries alike, the fundamental objective of the *Travel & Tourism Competitiveness Report (TTCR)* is to explore the factors driving T&T competitiveness worldwide.

Over the past three years, the World Economic Forum has engaged key industry and thought leaders through its Aviation, Travel and Tourism Industry Partnership Programme to carry out an in-depth analysis of the T&T competitiveness of economies around the world. The goal is to construct a platform for multi-stakeholder dialogue to ensure the development of strong and sustainable national T&T industries capable of contributing effectively to international economic development.

The theme of this second edition of the TTCR, “Balancing Economic Development and Environmental Sustainability,” reflects the increasing focus on ensuring the industry’s sustained growth while protecting the natural environment upon which it so greatly depends. The goal of achieving a sustainable T&T industry is certainly not new. However, the industry’s need to demonstrate strong leadership in this area has become important only in recent years, primarily as a result of increased global awareness of the impact of global climate change and pollution on tourist destinations.

This year’s report includes the second edition of the Travel & Tourism Competitiveness Index (TTCI), which is at the core of this *Report*. The aim of the TTCI, which covers 130 economies this year, is to provide a comprehensive strategic tool for measuring “the factors and policies that make it attractive to develop the Travel & Tourism sector in different countries.” By providing detailed assessments of the T&T environments in countries worldwide, the results can be used by all stakeholders to work together to improve the industry’s competitiveness in their national economies, thereby contributing to national growth and prosperity. This year’s Index has been reinforced to better capture the extent to which the sector is developed in an environmentally sustainable way.

The *Report* contains detailed profiles for each of the 130 economies featured in the study, as well as an extensive section of data tables with global rankings covering the more than 70 indicators included in the TTCI. In addition, the *Report* includes insightful contributions from a number of industry experts, with a particular focus on this year’s theme of environmental sustainability. These essay contributions explore issues such as identifying useful mechanisms for inducing travel-related emission reductions, the way in which green strategies will change how the tourism industry will operate in the future, and how environmental sustainability has more generally become a key driver of tourism competitiveness.

The *Travel & Tourism Competitiveness Report* could not have been put together without the distinguished thinkers who have shared with us their knowledge and experience. We are grateful to our Strategic Design Partner, Booz Allen Hamilton, and our Data Partners: Deloitte, the International Air Transport Association (IATA), the International Union for Conservation of Nature (IUCN), the World Tourism Organization (UNWTO), and the World Travel & Tourism Council (WTTC) for helping us to design and develop the TTCI and for providing much of the industry-relevant data used in its calculation. We thank our Industry Partners in this *Report*—Abercrombie & Kent, Bombardier, British Airways, Carlson, Emirates Airline, Hertz, Silversea Cruises Group, Swiss International Airlines, and Travelport—for their support in this important venture. We also wish to thank the editors of the *Report*, Jennifer Blanke and Thea Chiesa, for their energy and their commitment to the project. Appreciation also goes to Fiona Puaa, Head of Strategic Insight Teams, and the other members of the competitiveness team: Ciara Browne, Agustina Ciocia, Margareta Drzeniek Hanouz, Thierry Geiger, Irene Mia, Pearl Samandari, and Eva Trujillo. Finally, we would like to commend our network of 142 Partner Institutes worldwide, without whose enthusiasm and hard work the annual administration of the Executive Opinion Survey and this *Report* would not be possible.