

Executive Summary

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The Travel & Tourism (T&T) industry has become a key sector in the world economy and a major driver of economic growth and employment worldwide. As one of the fastest-growing industries in terms of foreign exchange earnings and job creation, healthy T&T sectors provide important opportunities for countries to raise living standards, and—particularly in the developing world—to tackle poverty alleviation.

Given the importance of the sector, three years ago the World Economic Forum embarked on an effort to better understand the drivers of T&T competitiveness and the challenges that face the industry at the present time. This second edition of the *Travel & Tourism Competitiveness Report* presents our latest thinking on the topic, with the goal of providing a useful tool for governments and business leaders in overcoming the obstacles to T&T competitiveness, in order to benefit fully from the sector's development.

The dependence of tourism on the quality of the natural environment places it in a special position in terms of environmental sustainability, leading national governments and the tourism industry to focus increasingly on environmental protection. Environmental conservation is now firmly at the center of discussions on national T&T competitiveness, given its importance for achieving long-term sustainable growth in the sector. In this context, this year's *Report*, under the theme "Balancing Economic Development and Environmental Sustainability," places a particular focus on the issue, both through a reinforced environmental component of the Index used to measure T&T competitiveness and through the topics covered by the analytical chapters.

The Travel & Tourism Competitiveness Index

A principal aim of this *Report* is to measure the competitiveness of individual economies' T&T competitiveness, using the comprehensive vehicle that has been developed for this purpose, the Travel & Tourism Competitiveness Index (TTCI), described in detail in Chapter 1.1.

The TTCI was produced by the World Economic Forum in close collaboration with Booz Allen Hamilton, 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). We have also received important feedback

from a number of key companies that are industry partners in the effort: Abercrombie & Kent, Bombardier, British Airways, Carlson, Emirates Airline, Hertz, Silversea Cruises Group, Swiss International Airlines, and Travelport. Several thought leaders from these companies and organizations have also contributed insightful papers addressing various aspects of T&T competitiveness, with a particular focus on environmental sustainability, which are described below.

The TTCI aims to measure *the factors and policies that make it attractive to develop the T&T sector in different countries*. The TTCI is composed 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*

The pillars are organized into three subindexes that capture broad categories of variables that facilitate or drive T&T competitiveness. These categories are (1) T&T regulatory framework, (2) T&T business environment and infrastructure, and (3) T&T human, cultural, and natural resources. The first subindex captures those elements that are policy related and generally under the purview of the government (policy rules and regulations, environmental sustainability, safety and security, health and hygiene, and prioritization of Travel & Tourism); the second subindex captures elements of the business environment and the infrastructure of each economy (air transport infrastructure, ground transport infrastructure, tourism infrastructure, ICT infrastructure, and price competitiveness); and the third subindex captures the human and cultural elements of each country's resource

endowments (human resources, affinity for Travel & Tourism, natural resources, and cultural resources).

Each of the pillars is made up of a number of individual variables, of which there are over 70 in all. 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 T&T institutions, and T&T 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. The exact methodology underlying the construction of the TTCI is described in Chapter 1.1.

Adjustments to the TTCI 2008

Some improvements have been made to the TTCI this year, both in terms of the structure of the model and with the addition of new data for important issue areas that were previously missing. In terms of structural changes, a first major improvement is that what was last year called the “environmental regulation” pillar 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.

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.

In addition, 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. More details on the structural changes and new data included can be found in Chapter 1.1.

The TTCI Rankings for 2008

The rankings from the TTCI for the 130 countries covered in this year's *Report* are presented in Table 1, with the rankings in each of the three subindexes. Tables 2, 3, and 4 show the rankings within each subindex and individual pillar.

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 excel-

lent 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 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.

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).

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).

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

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	PILLARS											
	T&T REGULATORY FRAMEWORK		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	PILLARS											
	T&T BUSINESS ENVIRONMENT AND INFRASTRUCTURE		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	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	PILLARS											
	T&T BUSINESS ENVIRONMENT AND INFRASTRUCTURE		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	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

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.

Barbados is the highest-ranked country in the Latin America and Caribbean 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.

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.

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).

Israel is the highest ranked country in the Middle East and North Africa 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.

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.

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.

Exploring sustainable Travel & Tourism

The *Report* also features a number of excellent contributions from T&T industry practitioners and experts, dealing with issues related directly to T&T competitiveness, and with a particular focus this year on environmental sustainability. The T&T industry is increasingly making efforts to make a positive contribution to the quality of the natural environment by adopting more environmentally friendly business practices that cut down CO₂ emissions as well as control overall pollution levels. Efforts are also focused on raising awareness of environmental issues and encouraging tourists to adopt eco-friendly practices that include, among others, offsetting

CO₂ emissions generated during a given trip. These special studies are highly business relevant and complement the TTCI, the country/economy profiles, and the data tables elsewhere in the *Report*.

In their chapter “Environmental Sustainability as a Driver for Competitiveness,” Jürgen Ringbeck and Stephan Gross of Booz Allen Hamilton explore how environmental sustainability is an important driver of T&T competitiveness, both for the public and the private sectors. The authors highlight examples of environmental impacts and potential initiatives that can be applied by different players of the T&T industry value chain to reduce their negative eco-footprint, while aligning ecological targets with economic goals.

They stress that taking action should be seen as a bottom-line business issue. The public sector needs to evaluate the total cost of operators and end consumer behavior, taking into consideration the environmental footprint of the industry as well as its impact on local population and society. By using “real life” examples, the authors highlight a regulatory framework that combines policies and incentives that drive environmental sustainability for the sector.

The public's rising consciousness of environmentally friendly behavior is also becoming a major factor for customer decisions. Starting with the distribution and sales of T&T packages, the end customer will be able to decide not only on the preferred destination, but also on the mode of transport and the particular hotel. With this increasing awareness, the demand for green tourism products is expected to grow further in the years to come. If private operators take advantage of this opportunity and effectively leverage this trend, they might be able not only to gain a competitive advantage, but also to attract new customer segments.

However, the authors point out that although the private sector is aware of these green trends in the market, only a minority of the industry players has yet developed a holistic, environment-oriented strategy. They conclude by stressing that to be successful in the long term, it will not be enough to opportunistically engage in green branding campaigns. Companies will have to establish initiatives that have a measurable positive and long-lasting impact on the environment—creating a value not only for the tourist but also for the industry and the society at the destination as a whole. They conclude with actionable steps that support private operators in the design and implementation of an environmentally sustainable strategy, which helps to define “green” initiatives that balance both ecological and economic goals.

In “Travel & Tourism: Moving on to Sustainability,” Ufi Ibrahim and Amir Girgis from the WTTC describe how emerging tourism destinations are exerting pressure on their natural, cultural, and socioeconomic surroundings. They explain that since the demand for global Travel & Tourism is expected to grow steadily over the

next decade, there is a danger that the long-term negative externalities of this forecasted growth could ultimately outweigh the economic gains. The present challenge is therefore to manage this growth, which generates income and employment, while minimizing the industry's impact on the environment and conserving the cultural heritage and local ecosystems of a country. This issue of sustainability is encapsulated in the WTTC's *Blueprint for New Tourism*.

They go on to explore how the results of the TTCI can be utilized to assess sustainable tourism from a global perspective. In particular, they describe how it could be an important tool for facilitating a new form of dialogue between the private and the public sectors, involving the participation of all stakeholders. Given that governments are increasingly aware of the importance of Travel & Tourism, they assert that the time has come to plan for the medium and long term accordingly.

The authors conclude by calling on leaders to begin defining coherent and streamlined management structures that can efficiently drive "New Tourism" as defined in the WTTC blueprint. For this to take place, policymakers should elevate Travel & Tourism to a strategic national level with senior-level policymaking by factoring it into all policies and decision-making, consequently promoting growth that respects both business needs and the well-being of citizens. Simultaneously, the industry should adapt strategic thinking in order to develop tourism with benefits for everyone, while at the same time extending and diversifying the products offered, thus improving yields and social value while maintaining a degree of corporate social responsibility.

In "The Travel & Tourism Competitiveness Index: Leveling the Playing Field," Geoffrey Lipman and John Kester of the UNWTO point out that although many developing countries do well in a number of areas measured by the TTCI, the criteria for competitiveness tend to place poor countries at a disadvantage in several areas: safety and security, health and hygiene, transport infrastructure, tourism infrastructure, ICT infrastructure, and human resources. This represents a structural difference between rich and poor nations that will take many years to change and will require a massive transfer of funds, building of infrastructure, and supply of technical know-how to developing countries. The authors argue that until this occurs, the competitive playing field is simply not level in these areas—and consequently not in the overall rankings. In this context, the authors suggest that, going into the future, a different presentation of results should be explored that would not automatically show poor countries in a disadvantaged way in a number of areas.

In addition, given increasing concerns about the impact of climate change, and in the context of the many activities that the UNWTO is carrying out in this area, the authors also call for an effort to strive to include over time all the criteria that will add a significant

climate change component to the TTCI. The authors realize that a change of this magnitude will take time to evaluate and to incorporate meaningfully into the Index and suggest that looking out to 2012 and 2015 might make sense as a timeframe in this effort.

In "Natural Capital Stewardship: A Basis for Travel & Tourism Competitiveness," Julia Marton-Lefèvre from the IUCN and Steve McCool from the University of Montana discuss how natural heritage protection is a key factor for ensuring the attractiveness of tourism destinations. The authors point out that tourism increasingly depends on opportunities to experience high-quality natural environments, with consumers becoming ever more sensitive to measures taken by the tourism industry, and by governments, to minimize negative impacts on those destinations.

Given that tourism is one of the sectors that directly rely on the quality of the host environment, the authors argue that biodiversity conservation should be an essential element of any strategy aimed at raising and strengthening the competitiveness of the tourism industry in any country. In addition, thanks to its potential to provide sustainable alternative livelihoods, they point out that tourism can play a strategic role in poverty reduction strategies, which should be intimately linked to any country's efforts toward competitiveness.

The authors stress, however, that moving in this direction must involve taking steps in conserving natural heritage and in restoring species and landscapes in danger. It will require integrated approaches that involve people and habitats in ways that both benefit, in ways that are effective, and in ways that create a sense of ownership and pride among local residents, who often feel they pay the price for conservation without receiving the benefits.

In her chapter "Travel & Tourism and the Common Good: A Call for Integrative Global Citizenship," Marilyn Carlson Nelson of Carlson discusses the importance of industry providing value beyond employment opportunities and shareholder returns, as this is of increasing importance to consumers, governments, civil society, and even business itself. As she notes, the T&T industry is in a unique position to make a positive difference in the quality of life, given its economic importance as a revenue generator and employment provider, as well as its role in bringing people together. This means that enlightened leaders of the industry must go beyond traditional day-to-day business and make efforts to improve individual lives and freedoms by partnering with governments and the civil sector to address national and global issues.

Nelson describes a number of global challenges, and the actions already being taken by individual T&T companies to address them. While these actions are very important, she stresses that today's key challenges—such as poverty, climate change, terrorism, disease, and corruption—cannot be neatly ascribed to any one

discipline for study, nor can they be wholly assigned to government, business, or society to solve on its own. Given the complexity and linkages of these problems, she calls for the development of cross-sector leadership to solve them.

The author concludes by noting that there are actions that the industry can take right now that are relevant to the challenges of today and will have an immediate effect, and there are also actions that can be taken to ensure that the T&T industry remains effective and relevant for generations to come. In this context, she calls on the industry—and innovative global leaders—to take responsibility for what can be controlled and resolve to work intelligently across sectors to create new solutions to improve the common good.

In “Too Hot to Handle? The Hospitality Industry Faces Up to Climate Change,” Alex Kyriakidis and Julia Felton of Deloitte focus on the hospitality industry’s carbon footprint, and on the way green strategies will impact the way hotels operate in the future. They also consider how changes to the world’s weather patterns will make some destinations much more popular, while others will see visitor numbers fall away.

Give the impact of the T&T industry on the environment and climate, and the increasing concern this raises among consumers, the authors note that operators must develop green and sustainable operations that will enable them to differentiate themselves from their competitors and appeal to environmentally aware tourists.

This strategy is likely to be increasingly successful as consumers become less focused on cost and more concerned about being eco-friendly. In order to make this recommendation concrete, the authors describe a number of case studies of companies that have been moving in this direction.

The authors conclude by saying that while politicians debate the outcome of the UN summit and how best to match individual aspirations to see the world with the issue of aviation emissions, the time is right for the hotel industry to make sure its own house is in order. By establishing best practices and a system of benchmarking that ensures a uniform approach, travelers will be reassured, knowing that the hotel they are staying in has built a sustainable future.

In his chapter “What Is Driving Travel Demand? Managing Travel’s Climate Impacts,” Brian Pearce, IATA’s Chief Economist, notes that the focus of existing policy aimed toward reducing CO₂ emissions from air travel, with measures such as the United Kingdom’s recent doubling of the air passenger duty, has been on trying to manage air travel demand by raising the cost of travel for passengers. The recent debate on emissions trading in Europe has also focused on the costs it will impose on airlines and their passengers.

However, Pearce presents new evidence suggesting that policies aiming to reduce CO₂ emissions by raising the cost of air travel are likely to fail. This is because

although individual tourists are sensitive to prices for air travel on competing airlines or to alternative destinations, the overall market is much less sensitive to this cost. Instead, economic growth and incomes are the key drivers of air travel demand, and those drivers are expected to remain particularly strong in the developing markets of Asia.

In this context, the author explains that in order to lower emissions, the focus should not be on demand management but rather on mechanisms to bring about emission reduction measures from technology, infrastructure, and operations. Technological progress will require collaboration across the value chain and across countries. Governments will need to play a role in funding fundamental research and in encouraging infrastructure improvements. The key lesson for both policymakers and the industry is to look beyond simple economic instruments for mechanisms that will bring about an effective reduction in emissions from air travel.

In “Measuring the Environmental Impact of Travel: Business Intelligence for Informed Travel Choice,” Richard H. Fly, Nigel Couzens, and Gordon Wilson of Travelport discuss how more and more companies, along with a growing number of consumers, want better information about the indirect emissions for which they are responsible, particularly the carbon emissions related to business and personal travel. In this context, one of the big challenges for businesses and consumers today is to gather more data and business intelligence about their impact on the environment, and especially—at a time when climate change has become the world’s most urgent environmental issue—about their carbon footprint.

The authors note that this desire for information has the potential to reshape the travel policies companies set and the choices companies and consumers make across a broad range of decisions: how they travel; when and where they travel; what airlines, hotels, and rental car companies they use; where they hold meetings and events—even whether they travel at all. Cost and convenience are still the key factors in travel decisions, but the environmental impact of travel—which will carry increasing costs of its own if carbon taxes and other levies proliferate—is becoming an important third factor for companies and individuals alike.

The authors describe a number of tools that are already available to enable companies and consumers to measure the environmental impact of their travel and tourism choices, as well as tools that are expected to be introduced in the near future. The challenge for the T&T industry is to use these tools to demonstrate its commitment to environmentally sustainable Travel & Tourism. The authors note that environmental sustainability is as much an opportunity as it is a challenge: as more and more people make purchasing decisions that incorporate environmental concerns, carbon efficiency has the potential to be a competitive advantage for suppliers at all levels of the T&T industry.

The authors conclude by noting that the T&T industry is nearing a tipping point where the combination of sophisticated measurement and reporting tools and growing customer demand for more sustainable travel choices are going to accelerate the industry's progress toward reducing carbon and other greenhouse gas emissions. That is good for the planet, good for the industry, and good for travelers.

Part 2 of the *Report* is a comprehensive data section that includes country/economy profiles for each of the 130 economies covered, as well as data tables for each of the individual variables used to assess national T&T competitiveness. Each section is preceded by a description of how to interpret the data provided. Technical notes and sources, included at the end of Part 2, provide details on the characteristics and sources of the individual hard data variables included in the *Report*.