

Insight Report

# The Travel & Tourism Competitiveness Report 2013

Reducing Barriers to Economic Growth and Job Creation

Jennifer Blanke and Thea Chiesa, editors





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Reducing Barriers to Economic Growth and Job Creation

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Jennifer Blanke

Thea Chiesa

Editors

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is published by the World Economic Forum within  
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The terms *country* and *nation* as used in this report do  
not in all cases refer to a territorial entity that is a state  
as understood by international law and practice. The  
terms cover well-defined, geographically self-contained  
economic areas that may not be states but for which  
statistical data are maintained on a separate and  
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The full edition of the *Report*, with profiles of all 140  
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# Preface

BØRGE BRENDE AND ROBERT GREENHILL

World Economic Forum

The World Economic Forum has, for the past seven years, engaged key industry and thought leaders through its Aviation, Travel & Tourism Industry Partnership Programme, along with its Global Agenda Council on New Models for Travel & Tourism, to carry out an in-depth analysis of the T&T competitiveness of economies around the world. The resulting *Travel & Tourism Competitiveness Report* provides a platform for multi-stakeholder dialogue to ensure the development of strong and sustainable T&T industries capable of contributing effectively to international economic development. The theme of this year's *Report*, "Reducing Barriers to Economic Growth and Job Creation," reflects the importance of the sector for this purpose.

Encouraging the development of the Travel & Tourism (T&T) sector is all the more important today given its important role in job creation, at a time when many countries are suffering from high unemployment. The sector already accounts for 9 percent of GDP, a total of US\$6 trillion, and it provides 120 million direct jobs and another 125 million indirect jobs in related industries. This means that the industry now accounts for one in eleven jobs on the planet, a number that could even rise to one in ten jobs by 2022, according to the World Travel & Tourism Council.

This edition of the *Report* comes at an uncertain time for the T&T sector. Although the global economy is showing signs of fragile recovery, the world is becoming increasingly complex and interconnected. In this context, it is notable that the T&T sector has remained remarkably resilient in a number of ways. The number of travelers has increased consistently over the past year, notwithstanding the difficult economic climate and shrinking budgets. Indeed, the UNWTO reports that international tourist arrivals grew by 4 percent in 2012, and forecasts that they will continue to increase by 3 percent to 4 percent in 2013. Although this trend is primarily driven by increasing demand from the emerging-market middle class, the picture has also been brightening for many developed economies.

The industry has responded to the changing environment with a number of structural adjustments. Indeed, 2012 witnessed a number of alliances, mergers, and strategic investments both in the aviation

industry and in online travel services. Resilience has also been demonstrated in the way that some aviation companies responded to erratic fuel prices by exploring new business models and acquiring energy assets. Additionally, industry players have made commitments to a low-carbon economy through several initiatives aimed at optimizing operations, retrofitting, recycling, and preserving the environment.

Yet despite these many positive developments, the need for greater openness remains one of the major trends impacting the T&T sector, especially with regard to the freer movement of people. The importance of efforts in this area has been highlighted specifically by the G20 Los Cabos communiqué in June 2012, in which the group recognized the importance of tourism "as a vehicle for job creation, economic growth and development" and furthermore committed to "work towards developing travel facilitation initiatives in support of job creation, quality work, poverty reduction and global growth."

At the core of the *Report* is the fifth edition of the Travel & Tourism Competitiveness Index (TTCI). The aim of the TTCI, which covers a record 140 economies this year, is to provide a comprehensive strategic tool for measuring the "factors and policies that make it attractive to develop the T&T sector in different countries." By providing detailed assessments of the T&T environments of 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. It also allows countries to track their progress over time in the various areas measured.

The full *Report* is downloadable from [www.weforum.org/ttcr](http://www.weforum.org/ttcr); this contains detailed profiles for each of the 140 economies featured in the study, as well as an extensive section of data tables with global rankings covering over 75 indicators included in the TTCI. In addition, it includes insightful contributions from a number of industry experts. These chapters explore issues such as how visa facilitation can play a relevant role in stimulating economic growth, the importance of policymakers leveraging local competitive advantages to thrive in a volatile environment, the impact of the tourism sector on employment creation, how the connectivity that the

aviation sector creates sustains economic development, and the essential role of green growth in enhancing the resilience of the sector.

*The Travel & Tourism Competitiveness Report 2013* 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 & Company, 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 TTCl and for providing much of the industry-relevant data used in its calculation. We thank our Industry Partners in this *Report*—namely Airbus/EADS, BAE Systems, Bahrain Economic Development Board, Bombardier, Delta, Deutsche Lufthansa/Swiss, Embraer, Etihad Airways, Jet Airways, Hilton, Lockheed Martin, Marriott, Safran, Starwood Hotels & Resorts, and VISA—for their support in this important venture.

We also wish to thank the editors of the *Report*, Jennifer Blanke and Thea Chiesa, as well as the project manager, Roberto Crotti, for their energy and their commitment to the project. Appreciation goes to other members of the competitiveness team: Beñat Bilbao-Osorio, Ciara Browne, Margareta Drzeniek Hanouz, Thierry Geiger, Tania Gutknecht, Caroline Ko, and Cecilia Serin. Finally, we would like to convey our sincere gratitude to our network of 150 Partner Institutes worldwide, without whose hard work the annual administration of the Executive Opinion Survey and this *Report* would not be possible.



# Executive Summary

JENNIFER BLANKE AND THEA CHIESA

World Economic Forum

The Travel & Tourism (T&T) industry has managed to remain relatively resilient over the recent year despite the uncertain global economic outlook, which has been characterized by fragile global economic growth, macroeconomic tensions, and high unemployment in many countries. Indeed, the sector has benefitted from the continuing globalization process: travel has been increasing in mature markets and, particularly, has been driven by the rising purchasing power of the growing middle class in many developing economies.

In such a context, Travel & Tourism has continued to be a critical sector for economic development and for sustaining employment, in both advanced and developing economies. A strong T&T sector contributes in many ways to development and the economy. It makes both direct contributions, by raising the national income and improving the balance of payments, and indirect contributions, via its multiplier effect and by providing the basis for connecting countries, through hard and soft infrastructure—attributes that are critical for a country's more general economic competitiveness.

Although developing the T&T sector provides many benefits, numerous obstacles at the national level continue to hinder its development. For this reason, seven years ago the World Economic Forum, together with its Industry and Data Partners, embarked on a multi-year research effort aimed at exploring various issues related to the T&T competitiveness of countries around the world. This year's *Report* is published under the theme "Reducing Barriers to Economic Growth and Job Creation," which reflects the forward-looking attitude of the sector as it aims to ensure strong growth going into the future.

## THE TRAVEL & TOURISM COMPETITIVENESS INDEX

The Travel & Tourism Competitiveness Index (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 & Company 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). We have also received important feedback from a number of key companies that are Industry Partners in the effort, namely Airbus/EADS, BAE Systems, the Bahrain Economic Development Board, Bombardier, Delta, Deutsche Lufthansa/Swiss, Embraer, Etihad Airways, Hilton, Jet Airways, Lockheed Martin, Marriott, Safran, Starwood Hotels & Resorts, and VISA.

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: (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.

Each of these three subindexes is composed in turn by 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**

Each of the pillars is, in turn, made up of a number of individual variables. The dataset includes both survey data from the World Economic Forum's annual Executive Opinion Survey (the Survey) and quantitative data from publicly available sources, international organizations, and T&T institutions and experts (for example, IATA, the

Table 1: The Travel &amp; Tourism Competitiveness Index 2013 and 2011 comparison

Country/Economy	2013		2011
	Rank/140	Score	Rank/139
Switzerland	1	5.66	1
Germany	2	5.39	2
Austria	3	5.39	4
Spain	4	5.38	8
United Kingdom	5	5.38	7
United States	6	5.32	6
France	7	5.31	3
Canada	8	5.28	9
Sweden	9	5.24	5
Singapore	10	5.23	10
Australia	11	5.17	13
New Zealand	12	5.17	19
Netherlands	13	5.14	14
Japan	14	5.13	22
Hong Kong SAR	15	5.11	12
Iceland	16	5.10	11
Finland	17	5.10	17
Belgium	18	5.04	23
Ireland	19	5.01	21
Portugal	20	5.01	18
Denmark	21	4.98	16
Norway	22	4.95	20
Luxembourg	23	4.93	15
Malta	24	4.92	26
Korea, Rep.	25	4.91	32
Italy	26	4.90	27
Barbados	27	4.88	28
United Arab Emirates	28	4.86	30
Cyprus	29	4.84	24
Estonia	30	4.82	25
Czech Republic	31	4.78	31
Greece	32	4.75	29
Taiwan, China	33	4.71	37
Malaysia	34	4.70	35
Croatia	35	4.59	34
Slovenia	36	4.58	33
Panama	37	4.54	56
Seychelles	38	4.51	n/a
Hungary	39	4.51	38
Montenegro	40	4.50	36
Qatar	41	4.49	42
Poland	42	4.47	49
Thailand	43	4.47	41
Mexico	44	4.46	43
China	45	4.45	39
Turkey	46	4.44	50
Costa Rica	47	4.44	44
Latvia	48	4.43	51
Lithuania	49	4.39	55
Bulgaria	50	4.38	48
Brazil	51	4.37	52
Puerto Rico	52	4.36	45
Israel	53	4.34	46
Slovak Republic	54	4.32	54
Bahrain	55	4.30	40
Chile	56	4.29	57
Oman	57	4.29	61
Mauritius	58	4.28	53
Uruguay	59	4.23	58
Jordan	60	4.18	64
Argentina	61	4.17	60
Saudi Arabia	62	4.17	62
Russian Federation	63	4.16	59
South Africa	64	4.13	66
India	65	4.11	68
Georgia	66	4.10	73
Jamaica	67	4.08	65
Romania	68	4.04	63
Lebanon	69	4.04	70
Indonesia	70	4.03	74

Country/Economy	2013		2011
	Rank/140	Score	Rank/139
Morocco	71	4.03	78
Brunei Darussalam	72	4.01	67
Peru	73	4.00	69
Sri Lanka	74	3.99	81
Macedonia, FYR	75	3.98	76
Ukraine	76	3.98	85
Albania	77	3.97	71
Azerbaijan	78	3.97	83
Armenia	79	3.96	90
Vietnam	80	3.95	80
Ecuador	81	3.93	87
Philippines	82	3.93	94
Trinidad and Tobago	83	3.93	79
Colombia	84	3.90	77
Egypt	85	3.88	75
Dominican Republic	86	3.88	72
Cape Verde	87	3.87	89
Kazakhstan	88	3.82	93
Serbia	89	3.78	82
Bosnia and Herzegovina	90	3.78	97
Namibia	91	3.77	84
Gambia, The	92	3.73	92
Honduras	93	3.72	88
Botswana	94	3.71	91
Nicaragua	95	3.67	100
Kenya	96	3.66	103
Guatemala	97	3.65	86
Iran, Islamic Rep.	98	3.64	114
Mongolia	99	3.63	101
Suriname	100	3.63	n/a
Kuwait	101	3.61	95
Moldova	102	3.60	99
Guyana	103	3.60	98
El Salvador	104	3.59	96
Rwanda	105	3.56	102
Cambodia	106	3.56	109
Senegal	107	3.49	104
Zambia	108	3.46	111
Tanzania	109	3.46	110
Bolivia	110	3.46	117
Kyrgyz Republic	111	3.45	107
Nepal	112	3.42	112
Venezuela	113	3.41	106
Tajikistan	114	3.41	118
Paraguay	115	3.39	123
Uganda	116	3.39	115
Ghana	117	3.38	108
Zimbabwe	118	3.33	119
Swaziland	119	3.31	116
Ethiopia	120	3.29	122
Cameroon	121	3.27	126
Pakistan	122	3.25	125
Bangladesh	123	3.24	129
Malawi	124	3.22	121
Mozambique	125	3.17	128
Côte d'Ivoire	126	3.15	131
Nigeria	127	3.14	130
Burkina Faso	128	3.12	132
Mali	129	3.11	133
Benin	130	3.09	120
Madagascar	131	3.09	127
Algeria	132	3.07	113
Yemen	133	2.96	n/a
Mauritania	134	2.91	136
Lesotho	135	2.89	135
Guinea	136	2.88	n/a
Sierra Leone	137	2.87	n/a
Burundi	138	2.82	137
Chad	139	2.61	139
Haiti	140	2.59	n/a

IUCN, the UNWTO, WTTC, UNCTAD, and UNESCO). The Survey is carried out among chief executive officers 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 details of the composition of the TTCl are shown in Appendix A of Chapter 1.1; detailed rankings and scores of this year's Index are found in Appendix B of that chapter.

## THE TRAVEL & TOURISM COMPETITIVENESS INDEX RANKINGS 2013

Table 1 shows the overall rankings of the 140 economies assessed in this edition TTCl, comparing this year's rankings with those from the 2011 edition of the *Report*. Switzerland maintains its top position in the rankings, which it has retained for five consecutive editions, since the very first *Travel & Tourism Competitiveness Report*. Tables 2–6 present the rankings in a regional context, grouping economies into the following five regional groups: Europe, the Americas, Asia Pacific (including Central Asia), the Middle East and North Africa, and sub-Saharan Africa. We discuss below a selection of countries from each region to provide a sense of the results and how they are interpreted at the national level. More countries are discussed in detail in Chapter 1.1.

### Europe

In line with statistics on international tourist arrivals, Table 1 shows that Europe remains the leading region for Travel & Tourism competitiveness, with all of the top five places taken by European countries. Likewise, 13 of the top 20 countries are from the region. Table 2 shows the rankings for European countries only, with the first column showing the rank within the region, the second column showing the overall rank out of all 140 economies included in the Index this year, and the third column showing the score. As the table shows, Switzerland is ranked 1st out of all countries in the 2013 TTCl, a position it has held since the first edition of this *Report* in 2007. Germany, Austria, Spain, and the United Kingdom complete the top five, while France and Sweden are among the top 10 overall.

**Switzerland** continues to lead the rankings, performing well on almost all aspects of the Index. Switzerland's infrastructure, especially ground transport (3rd), is among the best in the world. The country also boasts top marks for its hotels and other tourism-specific facilities, with excellent staff thanks to the availability of qualified labor to work in the industry (ranked 2nd)—perhaps not surprising in a country that holds many of the world's best hotel management schools. Switzerland

also attracts tourists because of its rich and well-managed natural resources. A large percentage of the country's land area is protected, environmental regulation is among the most stringent (3rd), and the T&T industry is considered to be developed in a sustainable way (7th). These good environmental conditions, combined with the high safety and security of the country (2nd), contribute to its solid T&T competitiveness. Switzerland is not only a strong leisure tourism destination but also an important business travel hub, with many international fairs and exhibitions held in the country each year, driving its showing on the cultural resources pillar (6th). Switzerland's strong performance in all these areas enables the country to somewhat make up for its lack of price competitiveness (139th), which, together with a fairly restrained international visa policy, does indeed limit the number of arrivals.

**Germany** ranks 2nd in Europe and out of all countries in the TTCl. Similar to Switzerland, its infrastructure is among the best in the world: it is ranked 6th for ground transport infrastructure and 7th for air transport infrastructure, facilitating connections both within the country and internationally. Germany also has abundant cultural resources (ranked 5th worldwide for its many World Heritage cultural sites) and is host to almost 600 international fairs and exhibition per year (2nd), while hotel prices are relatively competitive (55th). In addition, Germany makes great efforts to develop in a sustainable way (4th), with the world's most stringent environmental regulations—which are also among the best-enforced—and the strong support of international environmental efforts, as demonstrated through its ratification of many international environmental treaties.

**Austria** ranks 3rd, improving by one position since 2011. Its strong performance is driven by factors such as tourism infrastructure, in which it ties for 1st place with Italy; a welcoming attitude toward visitors; a very safe and secure environment (7th); and, most importantly, its rich cultural resources. Austria hosts nine World Heritage cultural sites, has excellent creative industries, and attracts many travelers with several fairs and exhibitions organized every year. The country's tourism industry is also being developed in a sustainable way (10th), with some of the most stringent (4th) and well-enforced (7th) environmental regulations in the world, driving its overall positive performance on environmental sustainability (ranked 6th).

**Spain** is the country among the top 10 that sees the most improvement since 2011: moving up four places since the last assessment, it is now ranked 4th. Spain continues to lead in cultural resources, ranking 1st this year in this area because of its extremely numerous World Heritage sites (2nd) and its large number of international fairs and exhibitions (3rd), as well as its significant sports stadium capacity. Its tourism infrastructure is another strength, with its many hotel

Table 2: The Travel &amp; Tourism Competitiveness Index 2013: Europe

Country/Economy	OVERALL INDEX			SUBINDEXES					
	Regional rank	Overall rank	Score	T&T regulatory framework		Business environment and infrastructure		T&T human, cultural, and natural resources	
				Rank	Score	Rank	Score	Rank	Score
Switzerland	1	1	5.66	1	5.94	1	5.42	2	5.63
Germany	2	2	5.39	8	5.57	6	5.29	7	5.31
Austria	3	3	5.39	2	5.80	11	5.11	9	5.24
Spain	4	4	5.38	14	5.48	5	5.30	6	5.36
United Kingdom	5	5	5.38	17	5.44	10	5.13	3	5.57
France	6	7	5.31	9	5.56	7	5.18	11	5.20
Sweden	7	9	5.24	12	5.54	23	4.89	8	5.30
Netherlands	8	13	5.14	16	5.45	15	5.01	16	4.97
Iceland	9	16	5.10	3	5.77	13	5.06	36	4.47
Finland	10	17	5.10	5	5.74	22	4.89	24	4.65
Belgium	11	18	5.04	18	5.43	26	4.78	18	4.90
Ireland	12	19	5.01	7	5.68	19	4.96	40	4.41
Portugal	13	20	5.01	20	5.42	27	4.78	19	4.84
Denmark	14	21	4.98	25	5.31	16	4.98	26	4.64
Norway	15	22	4.95	11	5.55	28	4.77	33	4.53
Luxembourg	16	23	4.93	21	5.41	20	4.96	39	4.42
Malta	17	24	4.92	15	5.47	14	5.06	49	4.22
Italy	18	26	4.90	50	4.90	29	4.76	14	5.05
Cyprus	19	29	4.84	22	5.35	21	4.89	46	4.27
Estonia	20	30	4.82	10	5.55	30	4.72	51	4.19
Czech Republic	21	31	4.78	28	5.24	37	4.49	28	4.61
Greece	22	32	4.75	39	5.02	33	4.65	30	4.58
Croatia	23	35	4.59	42	4.99	39	4.43	42	4.37
Slovenia	24	36	4.58	33	5.12	35	4.52	52	4.11
Hungary	25	39	4.51	26	5.29	49	4.16	54	4.08
Montenegro	26	40	4.50	34	5.09	50	4.14	47	4.26
Poland	27	42	4.47	49	4.92	58	3.94	32	4.56
Turkey	28	46	4.44	64	4.62	52	4.08	27	4.63
Latvia	29	48	4.43	35	5.08	40	4.40	77	3.81
Lithuania	30	49	4.39	41	4.99	48	4.19	61	3.98
Bulgaria	31	50	4.38	58	4.79	45	4.24	53	4.10
Slovak Republic	32	54	4.32	43	4.96	60	3.92	55	4.06
Russian Federation	33	63	4.16	92	4.24	46	4.22	58	4.02
Georgia	34	66	4.10	30	5.18	80	3.46	91	3.67
Romania	35	68	4.04	66	4.61	68	3.67	73	3.85
Macedonia, FYR	36	75	3.98	57	4.79	74	3.58	100	3.58
Ukraine	37	76	3.98	60	4.73	71	3.62	99	3.59
Albania	38	77	3.97	63	4.65	90	3.31	63	3.96
Armenia	39	79	3.96	51	4.88	88	3.34	94	3.65
Serbia	40	89	3.78	74	4.50	81	3.40	109	3.45
Bosnia and Herzegovina	41	90	3.78	75	4.47	95	3.19	92	3.66
Moldova	42	102	3.60	65	4.61	97	3.16	133	3.04

rooms, car rental facilities, and ATMs. Furthermore, its air transport infrastructure is highly developed and ranks among the top 10 worldwide. Spain has improved in a few areas since the last edition. In particular, starting a business has become less costly and onerous, according to the World Bank, and hotel prices have come down a bit. The government has also kept tourism high in its development agenda, making Spain a top 10 economy for prioritization of the industry. Spain has notably maintained its efforts on marketing activity and spending on the industry's development amid difficult economic circumstances.

**The United Kingdom** moves up by two more positions since the last edition of the *Report*, to reach 5th place this year. The country's T&T competitiveness is based on its excellent cultural resources (ranked 3rd), with many World Heritage cultural sites, a large number of international fairs, and strong creative industries (all ranked within the top 10). The country has probably benefitted from two important events in 2012: the Olympic Games and the Diamond Jubilee of Queen Elizabeth II. Although the outcome is not yet fully reflected in the data, the United Kingdom has leveraged the preparation of these events in terms of tourism campaigns, generating interest in visiting the country

and reinforcing their already-solid ICT and air transport infrastructure (ranked 10th and 5th, respectively). The generally supportive policy environment, ranked 8th, encourages the development of the sector, while the country relies on an excellent human resources base (ranked 6th). On a less positive note, the United Kingdom continues to receive one of the poorest assessments for price competitiveness (138th), in large part because it has the 2nd highest tax rate on tickets and airport charges worldwide.

**France** is ranked 7th overall in this edition, losing four positions since 2011. France continues to attract many tourists with its rich cultural heritage (ranked 4th for the number of World Heritage cultural sites and 8th for creative industries). The country also hosts many international fairs and exhibitions (ranked 5th). France's ground transport infrastructure is still one of the best in the world (ranked 5th), with particularly good roads and railroads as well as good air transport infrastructure (ranked 8th). However, the overall policy rules and regulation framework is not sufficiently supportive of developing the sector, and the prioritization of the T&T sector declines this year (ranked 35th overall). Additionally, the assessment has weakened somewhat in terms of the quality and availability of qualified labor in the country.

**Italy** moves up one spot this year to place 26th overall and 18th in Europe. As well as its cultural richness—with many World Heritage Sites, international fairs and exhibitions, and rich creative industries—Italy's strengths lie in its excellent tourism infrastructure (tying with Austria for 1st place) and its relatively good air transport infrastructure (24th). However, it faces a number of challenges that bring its overall rating down. These include policy rules and regulations that are still not sufficiently supportive of the development of the sector (100th) and a lack of price competitiveness (134th).

**Greece** is ranked 32nd, down another three positions since the last assessment. The country's rich cultural resources (ranked 25th) and excellent tourism infrastructure (3rd) are still important strengths. Additionally, Greece has very good health and hygiene conditions (ranked 13th overall) and good air transport infrastructure (20th). Further, there is a strong national affinity for tourism compared with many other European countries, including a generally open and positive attitude toward tourists. The decline in the rankings can be traced to a further worsening of the policy environment and a lower perceived prioritization of Travel & Tourism within the country, probably because of dwindling resources available for the particular industry amid general economic and financial difficulties.

**Turkey** climbs four positions this year to reach 46th place. The country's main strength continues to lie in its rich cultural resources (19th), with 20 World Heritage

cultural sites, several international fairs and exhibitions, and strong creative industries. In addition, Turkey gains significantly in a number of areas and has seen a significant increase in tourist arrivals over the last two years. The policy rules and regulations governing the sector are supportive and have continued to progress since the 2011 *T&T Report*. Turkey has also improved its air transport infrastructure (29th) and its tourism infrastructure (45th). However, some areas still hold back the overall T&T competitiveness performance of the country: although improving, safety and security issues (79th) remain worrisome, ground transport infrastructure is inadequate (especially railroads and ports), and ICT infrastructure remains unsatisfactory (71st), especially for a rapidly growing tourism destination. In addition, more efforts must be made toward environmental sustainability (ranked 95th), an area that will be of increasing concern going forward.

### The Americas

Table 3 shows the regional rankings for the countries in the Americas. As this table shows, **the United States** is the highest-ranked country in the Americas and 6th out of all countries, with stable performance since the last assessment. Overall, the country receives high marks for its business environment and infrastructure. In particular, the United States has excellent air transport infrastructure (ranked 2nd) and high-quality tourism infrastructure, as well as a strong focus on customer satisfaction. Its cultural resources and natural resources (ranked 5th and 3rd, respectively), with many World Heritage cultural and natural sites, drive its high position in the rankings, together with several fairs and exhibitions (1st) and strong creative industries (2nd). On a less positive note, the country's natural endowments are not being sufficiently protected (ranked 112th for environmental sustainability). Also, compared with other top-ranked economies, the quality of ground transport could be improved more (27th) and the perception of safety and security leaves room for improvement (57th).

**Canada** moves up one place to 8th overall. The country has several strengths, including its rich natural resources (10th) with numerous World Heritage sites (ranked 5th), excellent air transport infrastructure, highly qualified human resources (5th), and a strong policy environment (10th). Its cultural resources are also a strong point, with many international fairs and exhibitions in the country. Canada has lost some ground in terms of price competitiveness and environmental sustainability, where, although it still ranks fairly high (41st), it registers a decline in the perception of the enforcement of environmental regulations and continues to suffer from high CO<sub>2</sub> per capita emissions.

**Barbados** ranks 3rd in the region and 27th overall, up one place since the last assessment. Barbados comes in 2nd overall for the country's affinity for Travel

Table 3: The Travel &amp; Tourism Competitiveness Index 2013: The Americas

Country/Economy	OVERALL INDEX			SUBINDEXES					
	Regional rank	Overall rank	Score	T&T regulatory framework		Business environment and infrastructure		T&T human, cultural, and natural resources	
				Rank	Score	Rank	Score	Rank	Score
United States	1	6	5.32	44	4.95	2	5.36	1	5.65
Canada	2	8	5.28	27	5.27	8	5.17	5	5.39
Barbados	3	27	4.88	13	5.50	18	4.96	50	4.20
Panama	4	37	4.54	54	4.83	36	4.52	45	4.29
Mexico	5	44	4.46	83	4.43	61	3.92	15	5.02
Costa Rica	6	47	4.44	52	4.88	56	3.98	38	4.45
Brazil	7	51	4.37	82	4.43	76	3.57	12	5.10
Puerto Rico	8	52	4.36	40	4.99	43	4.33	81	3.75
Chile	9	56	4.29	53	4.87	53	4.07	65	3.94
Uruguay	10	59	4.23	31	5.18	78	3.53	62	3.97
Argentina	11	61	4.17	69	4.54	72	3.61	41	4.38
Jamaica	12	67	4.08	59	4.76	64	3.76	87	3.72
Peru	13	73	4.00	96	4.17	85	3.36	37	4.47
Ecuador	14	81	3.93	85	4.37	83	3.38	56	4.05
Trinidad and Tobago	15	83	3.93	104	4.07	54	4.07	95	3.64
Colombia	16	84	3.90	101	4.11	103	3.09	34	4.51
Dominican Republic	17	86	3.88	67	4.60	75	3.58	108	3.45
Honduras	18	93	3.72	97	4.17	92	3.28	89	3.69
Nicaragua	19	95	3.67	98	4.15	101	3.11	82	3.74
Guatemala	20	97	3.65	109	3.93	98	3.15	69	3.88
Suriname	21	100	3.63	106	4.05	100	3.11	86	3.72
Guyana	22	103	3.60	80	4.44	111	2.88	106	3.47
El Salvador	23	104	3.59	99	4.14	82	3.39	125	3.24
Bolivia	24	110	3.46	125	3.55	102	3.09	85	3.73
Venezuela	25	113	3.41	119	3.67	99	3.12	110	3.45
Paraguay	26	115	3.39	103	4.09	115	2.80	120	3.29
Haiti	27	140	2.59	138	2.93	136	2.39	140	2.44

& Tourism, with a positive attitude toward tourists and toward the value of tourism in the country, although it does receive a middling score for the degree of customer orientation (64th). The importance of the T&T sector for Barbados is reflected in the high prioritization placed on Travel & Tourism (8th), with significant emphasis put on the sector's development by the government and high spending on the sector, ensuring effective destination-marketing campaigns and collecting relevant sector data on a timely basis. However, although there have been some marginal improvements in some elements of its environmental sustainability, additional efforts to protect the natural environment would reinforce the country's strong T&T competitiveness.

**Panama** witnesses one of the most marked improvements in this year's TTCl, moving up to 37th position overall and 4th in the region. The country's most important competitive advantage is its rich endowment of natural resources, with its diverse fauna, significant protected land areas, and a number of World Heritage sites. The improvement in this year's rankings can be traced mainly to an improvement in the country's infrastructure. Tourism infrastructure has been developed (now ranked 42nd), most notably with more available hotel rooms. The quality of ground transport

has also improved across almost all modes, with port infrastructure now ranked 4th and railroads ranked 32nd. Air transport improves as well and is now ranked 16th. The expansion of stadium capacity and creative industries exports is also notable. On the other hand, areas requiring further improvement include safety and security (70th), the human resources base (79th), and health and hygiene standards (86th).

**Mexico** is stable this year at 44th position (and 5th in the region). Mexico receives impressive marks for its natural resources (ranked 8th), an area that shows an improvement since the last assessment, with many World Heritage natural sites and rich fauna. The country's cultural resources are also among the best in the world (21st), with 34 World Heritage cultural sites, several international fairs and exhibitions, and strong creative industries. These inherent strengths are reinforced by the overall prioritization of the sector in the country (34th) and effective marketing and branding campaigns. Some areas have improved, yet continue to require attention—for example, ground transport infrastructure is being developed but still ranks relatively low (69th), and more efforts are required to ensure that the sector is being developed in a sustainable way (105th). Finally, despite a marginal improvement since



last year, safety and security remains the main source of concern for the T&T sector, where Mexico still ranks a low 121st.

**Brazil** is ranked 7th in the Americas and 51st overall, up one position since 2011. The country is ranked 1st out of all countries for its natural resources and 23rd for its cultural resources, with many World Heritage sites, a good proportion of protected land area, and the richest fauna in the world. This is buttressed by a focus on environmental sustainability (ranked 30th), an area that has been improving over recent years, although the protection of the country's diverse fauna requires additional efforts. The safety and security environment and health and hygiene conditions have also improved slightly since the last assessment. On the other hand, the ground transport network remains underdeveloped (129th), with the quality of roads, ports, and railroads requiring improvement to keep pace with the economic development of the country. Preparations for two major sports events in the next five years (the FIFA World Cup in 2014 and the Olympic Games in 2016) provide opportunities to bridge the infrastructure gap. Brazil also continues to suffer from a lack of price competitiveness (126th), with high and increasing ticket taxes and airport charges, as well as high and rising prices more generally. Further, the overall policy environment is not particularly conducive to the development of the sector (ranked 119th), with discouraging rules on FDI, much time required for starting a business, and somewhat restrictive commitments to opening up tourism services under GATS commitments.

**Chile** ranks 9th in the region and 56th overall, maintaining a stable performance since the last assessment. It has notable cultural resources, with six World Heritage cultural sites and several international fairs and exhibitions. In addition, policy rules and regulations are conducive to the development of the T&T sector (12th), with few foreign ownership restrictions, a liberal visa regime, and open bilateral Air Service Agreements, although the time and cost for starting new businesses remain relatively high. The country also benefits from good safety and security by regional standards (31st). Additionally, tourism infrastructure has improved noticeably and now rank 49th. However, Chile's T&T competitiveness would be strengthened by upgrading its transport infrastructure and thus raising the quality of tourism infrastructure further, as well as by focusing more on preserving the environment to develop the industry in a more environmentally sustainable way.

**Peru** is ranked 13th in the region, placing 73rd overall. Peru's natural and cultural resources remain important assets for the tourism industry. The country has one of the richest fauna in the world (3rd) and hosts several natural and cultural World Heritage sites. Peru has seen a continuous growth in tourist arrivals and international flights, even during the global recession.

The effectiveness of marketing and branding to promote the T&T sector shows improvement, and government spending on the industry has increased slightly. However, in order to raise its T&T competitiveness further, safety and security must be improved (118th) and ground transport infrastructure must be upgraded (121st). Additionally, the country has lost some price competitiveness because of higher general and tourism-specific taxation, most notably the high ticket taxes and airport charges (where the country ranks 135th). A more in-depth analysis of the performance of the T&T competitiveness of Peru will be conducted in a dedicated publication to be issued in April 2013, on occasion of the World Economic Forum on Latin America 2013.

### Asia Pacific

Table 4 displays the regional rankings and data for the Asia Pacific region. As the table shows, **Singapore** is the top-ranked economy in the region at 10th position overall, the same position it has held for the past three editions. Singapore benefits from excellent transport infrastructure, with ground transport infrastructure and air transport infrastructure ranked 2nd and 14th, respectively. Singapore ranks 2nd for the high quality of its available human resources. And with its famously well-functioning public institutions, it is perhaps not surprising that Singapore ranks 1st out of all economies for its policy environment, with rules and regulations that are extremely conducive to the development of its T&T industries (policies facilitating foreign ownership and FDI, well-protected property rights, and few visa restrictions). Further, Singapore is among the safest economies of all assessed with regard to safety and security, and receives strong assessments for other types of infrastructure. One area of concern is its price competitiveness, which has eroded as seen in increasing hotel prices and taxation.

Singapore is followed in the regional rankings by **Australia**, which improves by two places and is now at 11th position overall. Australia's T&T competitiveness continues to be characterized by a number of clear strengths, including its rich natural resources and the highest number of World Heritage natural sites in the world, benefiting from diverse fauna and a comparatively pristine natural environment. Given the importance of the environment for much of its leisure tourism, it is notable that the stringency and enforcement of its environmental regulations are well assessed. And 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 4th) as well as good general tourism infrastructure (ranked 20th). Australia also sees some improvements in the policy rules and regulations affecting the sector, especially its increased

Table 4: The Travel &amp; Tourism Competitiveness Index 2013: Asia Pacific

Country/Economy	OVERALL INDEX			SUBINDEXES					
	Regional rank	Overall rank	Score	T&T regulatory framework		Business environment and infrastructure		T&T human, cultural, and natural resources	
				Rank	Score	Rank	Score	Rank	Score
Singapore	1	10	5.23	6	5.74	4	5.31	25	4.64
Australia	2	11	5.17	23	5.32	25	4.81	4	5.39
New Zealand	3	12	5.17	4	5.75	12	5.06	22	4.69
Japan	4	14	5.13	24	5.31	24	4.86	10	5.22
Hong Kong SAR	5	15	5.11	19	5.43	3	5.32	29	4.59
Korea, Rep.	6	25	4.91	38	5.02	17	4.98	20	4.74
Taiwan, China	7	33	4.71	29	5.19	34	4.63	44	4.29
Malaysia	8	34	4.70	55	4.82	41	4.36	17	4.93
Thailand	9	43	4.47	76	4.47	44	4.25	23	4.68
China	10	45	4.45	71	4.50	63	3.77	13	5.09
India	11	65	4.11	110	3.92	67	3.69	21	4.72
Indonesia	12	70	4.03	95	4.18	84	3.36	31	4.56
Brunei Darussalam	13	72	4.01	94	4.18	57	3.94	67	3.91
Sri Lanka	14	74	3.99	61	4.68	86	3.35	66	3.93
Azerbaijan	15	78	3.97	46	4.94	87	3.34	96	3.63
Vietnam	16	80	3.95	88	4.30	94	3.26	43	4.30
Philippines	17	82	3.93	70	4.51	89	3.33	64	3.95
Kazakhstan	18	88	3.82	62	4.66	79	3.48	119	3.30
Mongolia	19	99	3.63	91	4.25	107	2.96	90	3.69
Cambodia	20	106	3.56	105	4.06	112	2.86	78	3.77
Kyrgyz Republic	21	111	3.45	93	4.23	131	2.61	103	3.51
Nepal	22	112	3.42	100	4.14	128	2.64	105	3.48
Tajikistan	23	114	3.41	90	4.28	123	2.69	122	3.26
Pakistan	24	122	3.25	131	3.38	104	2.99	116	3.38
Bangladesh	25	123	3.24	124	3.56	109	2.91	124	3.24

openness in bilateral Air Service Agreements. In terms of visa requirements, Australia has one of the most advanced visa policies in the world (especially with respect to the electronic visa process) at a time when a number of other countries are moving in the opposite direction.

**New Zealand** ranks 3rd in the region and 12th overall, an improvement of seven positions, one of the most significant in the region. The country continues to benefit from its rich natural resources, with a number of World Heritage natural sites (ranked 18th) and a pristine natural environment (ranked 3rd), protected by strong and well-enforced environmental legislation. The country's policy rules and regulations are highly conducive to the development of the sector (ranked 2nd), with very transparent policymaking and among the least time and lowest cost required to start a business in the world. The country also benefits from high-quality human resources (ranked 13th) and a very safe and secure environment overall (9th). Although New Zealand's ground transport network remains somewhat underdeveloped given its advanced stage of development, its air transport infrastructure gets excellent marks (ranked 12th) and its ICT infrastructure is quite good by international standards. The most relevant improvement in New Zealand's performance in this edition is registered in its tourism infrastructure, driven

especially by a rise in the number of available hotel rooms.

**Japan** is ranked 4th regionally and 14th out of all the economies in the TTCl, up eight places since the last assessment. This achievement is especially impressive against the backdrop of the 2011 tsunami and related nuclear disaster. Japan's T&T sector resilience can be ascribed to its rich cultural resources (ranked 11th), with its 32 World Heritage cultural sites, the many international fairs and exhibitions hosted by the country, and its rich creative industries. Its ground transport infrastructure is among the best in the world (ranked 7th), especially its railroads, and Japan continues to lead in the area of education and training (ranked 13th). Moreover, it has continued to develop its already strong ICT infrastructure and now ranks 7th in this area. In addition, Japan's extremely customer oriented culture (1st) is an important strength for the T&T industry. On the other hand, the country continues to be an expensive destination, ranking 130th in the price competitiveness pillar.

**Hong Kong SAR** is ranked 15th. Its transport infrastructure is among the most developed in the world, with the best ground transport infrastructure and air transport infrastructure that ranks 6th. Further, the economy's ICT infrastructure ranks 2nd worldwide, demonstrating an important support for an industry that



depends so much on ICTs. Additionally, Hong Kong benefits from strong safety and security (3rd) as well as a conducive business environment, coming in 3rd in the policy rules and regulations pillar. It also receives relatively good marks for cultural resources, with many international fairs and exhibitions and strong creative industries. However, Hong Kong trails other advanced economies in the region for its lack of emphasis on environmental sustainability, where it ranks a low 118th.

**Korea, Rep.** is ranked 25th, just ahead of Taiwan and Malaysia in the regional rankings and improving by seven places. Korea's strengths lie in its excellent ground transport and ICT infrastructure (ranked 16th and 1st, respectively) and its rich cultural resources (ranked 10th). Its rise in the overall rankings is driven by improvements in almost all the pillars, with a measurable increase in the prioritization and affinity for Travel & Tourism, thanks to increased marketing and branding efforts, and a high degree of customer orientation (9th). On a less positive note, Korea remains a relative costly destination (ranked 96th for price competitiveness) and, despite much discussion in public discourse, the tourism sector is not being developed in a sufficiently sustainable way (69th), although there are improvements since the last assessment.

**Malaysia** is ranked 8th regionally and 34th overall, up one position since the 2011 *-Report*. Malaysia benefits from its rich natural resources (ranked 18th) and its cultural resources (ranked 31st). The country also benefits from excellent price competitiveness (ranked 5th), with comparatively low fuel prices, low ticket taxes and airport charges, competitive hotel prices, and a favorable tax regime. Malaysia's policy environment is assessed as very conducive to the development of the sector (ranked 9th), an area that has improved since the last assessment, and the country is characterized by a strong affinity for Travel & Tourism more generally (ranked 16th). However, health and hygiene indicators trail those of many other countries in the region, with, in particular, a low physician density and few hospital beds available. Further, environmental sustainability remains an area for improvement, with high emission levels and several threatened species, although business leaders feel that efforts are being made in this area.

**Thailand** is ranked 9th in the region and 43rd overall. The country declines by only two places since the last edition, demonstrating some resilience to the natural disasters and political unrest with which the country has been grappling. Thailand is endowed with rich natural resources and a strong affinity for Travel & Tourism (ranked 23rd and 18th, respectively), with a very friendly attitude of the population toward tourists (ranked 13th). This is buttressed by the government's strong prioritization of the sector, with good destination-marketing campaigns (11th) and relative price competitiveness (25th). However, some weaknesses

remain: despite the prioritization of the sector by the government, some aspects of the regulatory environment—such as the protection of property rights and the long time required for starting a business—are not particularly conducive to developing the sector (ranked 77th). In addition, given the importance of the natural environment for the country's tourism, environmental sustainability should be a greater priority (ranked 99th on this indicator).

**China** is ranked 10th regionally, losing six places and falling to 45th overall this year. China continues to build on some clear strengths: it comes in 5th for its natural resources, with many World Heritage natural sites and fauna that are among the richest in the world. It places 15th for its cultural resources, with several World Heritage cultural sites, many international fairs and exhibitions, and creative industries that are unsurpassed. Moreover, the country continues to develop its infrastructure, with improvements in air transport (35th) and ground transport (51st). However, some weaknesses pull the country's ranking down. China's policy environment is not highly conducive to the T&T sector's development (ranked 86th). Furthermore, there are increasing concerns related to the sustainable development of the sector (109th). China's tourism infrastructure remains underdeveloped (ranked 101th), with few international-quality standard hotel rooms available and few ATMs, and the country receives a poor assessment for its general affinity for Travel & Tourism, where it ranks 129th. Finally, although the country continues to benefit from relative price competitiveness (ranked 37th), this advantage has started to weaken under the weight of increasing inflation in several areas, as demonstrated by higher hotel prices and weakening purchasing power.

**India** is ranked 11th in the region and 65th overall, gaining three places since the last edition. As with China, India is well assessed for its natural resources (ranked 9th) and cultural resources (24th), with many natural and cultural World Heritage sites, rich fauna, many fairs and exhibitions, and strong creative industries. India also has quite good air transport (ranked 39th), particularly given the country's stage of development, and reasonable ground transport infrastructure (ranked 42nd), although the quality of roads (85th) and of ports (79th) require further improvement. In addition, India remains a relatively price competitive destination (20th), even in the regional context. However, some aspects of its tourism infrastructure remain somewhat underdeveloped (ranked 95th), with very few hotel rooms per capita by international comparison and low ATM penetration. ICT infrastructure also remains somewhat underdeveloped and underexploited (111th). Another area of concern is the policy environment, which is ranked 125th because of the long time and high cost required to start a business, a restrictive visa policy (132nd), and low level

of commitment in GATS agreements for tourism services (114th). Other areas requiring attention are health and hygiene standards (109th) and the country's human resources base (96th).

**Indonesia** is ranked 12th in the region, right behind India the regional rankings and 70th overall, up four places since the last edition. In terms of strengths, Indonesia places 6th for its excellent natural resources, with several World Heritage natural sites and the richness of its fauna as measured by the known species in the country. Indonesia also has rich cultural resources (ranked 38th), with 10 World Heritage cultural sites, a number of international fairs and exhibitions held in the country, and strong creative industries. Further, the country is ranked 9th overall on price competitiveness in the T&T industry because of its competitive hotel prices (ranked 21st), low ticket taxes and airport charges, and favorable fuel prices. In addition, it is ranked 19th for its national prioritization of Travel & Tourism. However, these strengths are held back by underdeveloped infrastructure in the country, especially ground transport (87th), tourism infrastructure (113th), and ICT infrastructure (87th); together these represent significant investment opportunities in the country. There are also some concerns related to safety and security, particularly the business costs of crime and potential terrorism. In addition, Indonesia is not ensuring the environmentally sustainable development of the tourism sector (ranked 125th), an area of particular concern given the sector's dependence on the quality of the natural environment.

**The Philippines** is the most improved country in the region, ranking 16th regionally and 82nd overall, up 12 places since the last edition. Among the country's comparative strengths are its natural resources (44th), its price competitiveness (24th), and a very strong—and improving—prioritization of the Travel & Tourism industry (this indicator ranks 15th, as government spending on the sector as a percentage of GDP is now 1st in the world, and tourism marketing and branding campaigns are seen to be increasingly effective). In addition, the country has been ensuring that several aspects of its policy rules and regulations regime are conducive to the development of the T&T sector. Among these are better protection of property rights, more openness toward foreign investments, and few visa requirements for foreign visitors (ranked 7th). However, other areas—such as the difficulty of starting a business in the country, in both cost and length of the process (ranked 94th and 117th, respectively)—remain a challenge. Moreover, safety and security concerns (ranked 103rd); inadequate health and hygiene (94th); and underdeveloped ground transport, tourism, and ICT infrastructure are all holding back the potential of the economy's T&T competitiveness.

## The Middle East and North Africa

Table 5 shows the regional rankings for the Middle East and North Africa region. As the table shows, the **United Arab Emirates (UAE)** continues to lead the region at 28th overall, up two places since the last assessment. Although the UAE is not endowed with rich natural resources, it has built a cultural resource base, attracting both leisure and business travelers, with several and growing international fairs and exhibitions and increasingly diverse creative industries. In addition, the country is characterized by a strong affinity for Travel & Tourism (24th). Perhaps the most important competitive advantage of UAE T&T competitiveness relates to its world-class international hubs for global air travel. Further, the country has carried out effective marketing and branding campaigns (1st) and has embraced policy rules and regulations that are conducive to the development of the sector (13th). In particular, the country is open to foreign investments (14th) and has a liberal visa regime (33rd). Environmental sustainability, although improving somewhat compared with past years, continues to be an area of some concern (ranked 91st). Hotel prices are also somewhat high by international standards (101st).

**Qatar** is ranked 2nd in the region and 41st overall, up one place since the last assessment. Qatar benefits from a safe and secure environment (ranked 21st), good ICT and tourism infrastructures (32nd and 37th, respectively), and excellent air transport infrastructure (23rd), in line with its role as an air transportation hub. The ease of hiring foreign labor (4th), increasing enrollment rates, and the quality of its education drive the ability of the country to find high-quality human resources (ranked 7th) inside and outside the country. Qatar also has a high degree of customer orientation (5th). In order to further enhance the country's T&T competitiveness, Qatar should continue to improve its focus on environmental sustainability (59th) and ensure that it does not lose sight of the importance of the sector for its development—at a rank of 80 in this edition, the prioritization of the sector is somewhat lower than in past years.

**Israel** is ranked 3rd in the region, dropping seven places to 53rd overall. Israel benefits from its cultural attributes, including a number of World Heritage cultural sites. The country's human resources base is also well evaluated (31st), providing healthy and well-trained people to work in the T&T sector. Further, its ICT infrastructure is quite well developed (27th), while its health and hygiene gets a good mark (26th), especially in a regional context. On a less positive note, some aspects of safety and security continue to erode at the country's T&T competitiveness: these are primarily related to concerns about terrorism (Israel ranks 124th on this indicator, somewhat lower than in the last edition). However, the decline in rank since the last

Table 5: The Travel &amp; Tourism Competitiveness Index 2013: The Middle East and North Africa

Country/Economy	OVERALL INDEX			SUBINDEXES					
	Regional rank	Overall rank	Score	T&T regulatory framework		Business environment and infrastructure		T&T human, cultural, and natural resources	
				Rank	Score	Rank	Score	Rank	Score
United Arab Emirates	1	28	4.86	45	4.95	9	5.14	35	4.51
Qatar	2	41	4.49	48	4.93	31	4.70	75	3.85
Israel	3	53	4.34	36	5.07	51	4.08	71	3.86
Bahrain	4	55	4.30	77	4.46	32	4.69	83	3.74
Oman	5	57	4.29	56	4.81	47	4.20	76	3.84
Jordan	6	60	4.18	37	5.05	69	3.63	72	3.86
Saudi Arabia	7	62	4.17	87	4.32	38	4.43	80	3.76
Lebanon	8	69	4.04	73	4.50	65	3.74	70	3.87
Morocco	9	71	4.03	68	4.59	73	3.60	68	3.89
Egypt	10	85	3.88	86	4.35	77	3.56	84	3.74
Iran, Islamic Rep.	11	98	3.64	112	3.90	96	3.18	74	3.85
Kuwait	12	101	3.61	114	3.81	62	3.89	131	3.14
Algeria	13	132	3.07	134	3.30	126	2.66	123	3.25
Yemen	14	133	2.96	140	2.82	110	2.89	128	3.18
Mauritania	15	134	2.91	137	3.07	133	2.60	132	3.07

assessment can also be attributed to diminished price competitiveness (ranked 133rd), the result of increasing fuel prices, hotel prices, ticket taxes, and airport charges and the perception that general taxation has become more distortionary.

**Bahrain** is ranked 4th in the region and 55th overall, down 15 positions since the last assessment. The country maintains a number of clear strengths: good transport infrastructure, particularly ground transport infrastructure (ranked 11th); high-quality human resources in the country (26th); and strong price competitiveness (7th). However, Bahrain is seeing a weakening in the assessment of its tourism infrastructure (66th), while health and hygiene standards (89th) and ICT infrastructure (47th) struggle to keep up with rapid population growth. Also its limited natural resources (129th) and environmental sustainability (103rd) do not help the country to attract tourists.

### Sub-Saharan Africa

Table 6 shows the results for the sub-Saharan region which sees **the Seychelles** entering the rankings for the first time at the top of the region, and 38th overall. The importance of Travel & Tourism for the country's economy is reflected in its top ranking for the prioritization of the industry, with the 2nd highest T&T expenditure-to-GDP ratio in the world and effective marketing and branding campaigns. These efforts are reinforced by a strong national affinity for Travel & Tourism (5th); good tourism infrastructure, especially in terms of available hotel rooms (6th); and good ground and air transport infrastructures, particularly by regional standards (31st and 27th, respectively). These positive attributes somewhat make up for its relative lack of price competitiveness (120th). Although the

natural environment is now assessed as being in good condition, efforts to develop the industry in a sustainable way could be reinforced, for example by increasing marine and terrestrial protection, which would help to protect the many threatened species in the country (132nd).

**Mauritius** loses its number one spot in the regional rankings, overtaken by the entry of the Seychelles this year, and is ranked 58th overall. The prioritization of the industry remains high (3rd), together with a strong national affinity for Travel & Tourism (6th). The country's tourism and ground infrastructure are well developed by regional standards (48th and 37th, respectively), and its policy environment is supportive of the development of the sector (ranked 28th). Mauritius also benefits from high marks for safety and security (36th). However, the country has seen its price competitiveness decline significantly (ranked 75th, down from 18th in the last assessment)—primarily the result of increasing hotel and fuel prices and high ticket taxes and airport charges. Additionally, in terms of challenges, the country's environmental sustainability has received a weakened assessment, of particular concern given the importance of the natural environment for the country's leisure tourism.

**South Africa** is ranked 3rd in the region and 64th overall, gaining two places since the last edition. South Africa comes in high at 17th place for its natural resources and 58th for its cultural resources, based on its many World Heritage sites, its rich fauna, its creative industries, and the many international fairs and exhibitions held in the country. Infrastructure in South Africa is also well developed for the region, with air transport infrastructure ranked 43rd and a particularly good assessment of railroad quality (46th) and road

Table 6: The Travel &amp; Tourism Competitiveness Index 2013: Sub-Saharan Africa

Country/Economy	OVERALL INDEX			SUBINDEXES					
	Regional rank	Overall rank	Score	T&T regulatory framework		Business environment and infrastructure		T&T human, cultural, and natural resources	
				Rank	Score	Rank	Score	Rank	Score
Seychelles	1	38	4.51	47	4.94	42	4.35	48	4.26
Mauritius	2	58	4.28	32	5.16	55	4.04	93	3.65
South Africa	3	64	4.13	81	4.44	59	3.93	57	4.03
Cape Verde	4	87	3.87	79	4.45	66	3.72	107	3.45
Namibia	5	91	3.77	89	4.30	70	3.62	115	3.38
Gambia, The	6	92	3.73	72	4.50	93	3.27	111	3.43
Botswana	7	94	3.71	84	4.38	91	3.31	112	3.43
Kenya	8	96	3.66	108	3.98	105	2.98	60	4.01
Rwanda	9	105	3.56	78	4.46	117	2.74	104	3.49
Senegal	10	107	3.49	111	3.91	113	2.84	88	3.71
Zambia	11	108	3.46	102	4.11	122	2.69	98	3.60
Tanzania	12	109	3.46	118	3.67	125	2.68	59	4.02
Uganda	13	116	3.39	116	3.71	121	2.70	79	3.76
Ghana	14	117	3.38	113	3.86	108	2.94	117	3.35
Zimbabwe	15	118	3.33	117	3.67	116	2.76	101	3.56
Swaziland	16	119	3.31	107	4.02	106	2.96	135	2.94
Ethiopia	17	120	3.29	122	3.60	127	2.65	97	3.61
Cameroon	18	121	3.27	123	3.58	124	2.68	102	3.56
Malawi	19	124	3.22	115	3.77	135	2.48	113	3.43
Mozambique	20	125	3.17	121	3.64	120	2.72	130	3.15
Côte d'Ivoire	21	126	3.15	133	3.31	118	2.73	114	3.41
Nigeria	22	127	3.14	135	3.26	114	2.83	118	3.33
Burkina Faso	23	128	3.12	120	3.64	134	2.55	129	3.16
Mali	24	129	3.11	128	3.45	129	2.61	121	3.28
Benin	25	130	3.09	127	3.46	130	2.61	126	3.20
Madagascar	26	131	3.09	132	3.33	119	2.73	127	3.20
Lesotho	27	135	2.89	126	3.46	132	2.60	139	2.62
Guinea	28	136	2.88	136	3.24	137	2.38	134	3.03
Sierra Leone	29	137	2.87	129	3.43	138	2.36	137	2.81
Burundi	30	138	2.82	130	3.40	139	2.33	138	2.73
Chad	31	139	2.61	139	2.90	140	2.11	136	2.82

quality (42nd). Overall, policy rules and regulations are conducive to the sector's development (ranked 29th); this is an area where the country has improved steadily over the past few assessments, with well-protected property rights and few visa requirements for visitors. Indeed, tourism continues to be one of the five priority sectors in the country's growth plan, and the government has reviewed tourism legislation in an effort to streamline it further. However, there are also some areas of weakness that have brought down the country's overall ranking. Safety and security remains quite worrisome (ranked 117th), as does the level of health and hygiene (87th)—the result of low physician density and concerns about access to improved sanitation. Related to this, human resources are also negatively affected by the poor health of much of the workforce, with a low life expectancy (129th, at 52 years) driven by high rates of communicable diseases such as HIV (137th). Improving the health of the workforce is of urgent concern for the future of the T&T sector, as well as for all other sectors in the economy. Additionally, this year South Africa has experienced an increase in fuel prices (77th) and ticket taxes and

airport charges (105th), which have diminished its price competitiveness.

**Namibia** reaches 5th place the regional rankings, coming in at 91st overall. The country benefits from its rich natural resources, with rich fauna and a pristine natural environment. Indeed, environmental sustainability is prioritized to some extent in the country (ranked 36th), which is critical given the importance of the quality of the environment for Namibia's tourism. In addition, ground transport infrastructure is somewhat developed by regional standards (60th). In order to further develop the sector, a more conducive policy environment will be important. For example, despite efforts in recent years, it remains costly and time consuming to start a business. Health and hygiene is also not up to international standards (106th): the country has few doctors and insufficient access to improved sanitation and drinking water. More generally, improving the country's human resources base (130th) through better education and training and more conducive labor laws will be critical.

**Botswana** is ranked 7th in the region and 94th overall, down three places since the last edition of

the Index. The country, known for its beautiful natural parks, is ranked 39th out of all countries for its natural resources, with much nationally protected land area, rich fauna, and limited environmental damage. The country also benefits from excellent price competitiveness, where it is ranked 12th because of low ticket taxes and airport charges and a favorable tax regime. In addition, some aspects of the policy environment are supportive of the sector's development, including well-protected property rights and few visa restrictions. However, Botswana does face some challenges that lead to its rather low ranking overall. The country's bilateral Air Service Agreements are not rewarded as open (120th), and much time is still required to start a new business (61 days, placing the country 131st). Further, Botswana's transport and ICT infrastructures are somewhat underdeveloped, as is its tourism infrastructure, with a low hotel room concentration, a limited presence of international car rental companies, and relatively few ATMs. Despite slight improvements, some concerns remain in the area of health and hygiene (97th), attributable to a low physician density, limited hospital beds, and insufficient access to improved sanitation. Associated with this, Botswana's greatest comparative weakness is the health of the workforce.

**Kenya**, a country long famous for its tourism attributes, is ranked 8th regionally and 96th overall, rising seven places since the last assessment. Kenya is ranked 14th for its natural resources, with its three World Heritage natural sites and its rich diversity of fauna. Tourism is a recognized priority within the country (ranked 23rd on this pillar), with high government spending on the sector and effective destination-marketing campaigns. In addition, a strong focus on environmental sustainability results in a rank of 21st, which is particularly important for Kenya given the sector's dependence on the natural environment. This focus seems to be bearing fruit and contributes to the overall improvement of Kenya in the rankings. On the downside, the policy environment presents a mixed picture and is not sufficiently conducive to the development of the sector (ranked 95th). Although openness in terms of visa requirements and bilateral Air Service Agreements has improved significantly, property rights are insufficiently protected, and much time and high costs are still required to start a business. In addition, infrastructure remains underdeveloped and health and hygiene levels require improvement, as does the human resources base (106th). Finally, the security situation in the country remains a significant hindrance to further developing the sector (ranked 135th).

**Tanzania** ranks 12th in the region and 109th overall, moving up one place since the last assessment. Tanzania's biggest attraction for tourists remains its outstanding endowment in natural resources (4th), with several World Heritage natural sites, rich fauna, and

much protected land area. This is buttressed by some focus in the country on environmental sustainability (ranked 45th). However, protecting the country's rich fauna remains challenging, as demonstrated by the low rank (110th) for the percentage of threatened species in the country. Tanzania's policy environment has improved significantly in terms of the openness of the country's bilateral Air Service Agreements and visa requirements. Nonetheless, further efforts are required in the area by better protecting property rights (103th) and lowering the costs and time required to start a business. The other main issues of concern are insufficient safety and security (120th) and infrastructure that requires significant upgrading. Another area Tanzania should focus on must be improving the human resources base (116th), especially the improving health of the workforce and upgrading the educational system.

### Exploring issues of T&T competitiveness

*The Travel & Tourism Competitiveness Report* not only provides a snapshot of the T&T competitiveness of the 140 economies assessed by the TTCl, it also complements this analysis with insightful contributions from T&T industry experts on specific relevant challenges and issues the industry is confronting today.

In their chapter "How to Succeed as a Tourism Destination in a Volatile World," Jürgen Ringbeck and Timm Pietsch of Booz & Company analyze which capabilities policymakers need to strengthen or develop in order to ensure the long-term stability of their tourism economies. In recent years, the environment in which countries compete for international visitors has become increasingly challenging. Economic shocks, political instability, and natural disasters have significantly affected tourism in many countries that previously experienced strong growth in their tourism economy. Less visibly but equally potent, long-term change drivers in regional tourism demand, travel distribution, and demographic drifts have accelerated and started to make a real impact on the global tourism landscape. Together, these factors require policymakers to rethink their tourism development agenda to date and focus on capabilities best suited to leverage increased volatility to create sustainable advantage.

By comparing the results of the Travel & Tourism Competitiveness Index with a measure reflecting stable and dynamic international visitor growth, the authors identify a set of qualifying capabilities and true differentiators that have had a positive impact on tourism growth in recent years for both developing and established-destination countries. Accordingly, the authors provide recommendations for action areas in which tourism policymakers need to do better in order to succeed in a more volatile world.

In their chapter entitled "Visa Facilitation: Stimulating Economic Growth and Development through Tourism,"



Dirk Glaesser and John Kester from the UNWTO discuss the importance of visa facilitation to fully reap the benefits international tourism can bring to an economy. Building on the joint research that the UNWTO and WTTC presented to the 4th T20 Ministers Meeting in May 2012, they find that improving visa facilitation could generate an additional US\$206 billion in tourism receipts and create as many as 5.1 million new jobs by 2015 in the G-20 economies. Their in-depth analysis of the policies adopted by countries shows that notable progress toward visa facilitation has been made over recent years. While at the beginning of 2008, destinations requested an average 77 percent of the world's population to apply for a traditional visa prior to departure, this percentage had declined to 63 percent by 2012.

However, a large variety of visa policies is in place: on one hand, some 18 percent of the world's population was able to enter a destination without a visa, and another 17 percent was able to receive a visa on arrival. On the other hand, destinations around the world still require, on average, two-thirds of the world's population to obtain a visa prior to departure.

Despite the progress made, the authors identify some areas of opportunity for visa facilitation going forward. These opportunities include improving the delivery of information on entry formalities and procedures; facilitating the way visa requests for temporary visitors are processed; differentiating the process for certain types of visitors, especially temporary visitors visiting for tourism purpose; instituting electronic visa (eVisa) programs; and establishing regional agreements.

In "The Economic Benefits of Aviation and Performance in the Travel & Tourism Competitiveness Index," Julie Perovic of IATA presents the findings of work conducted in partnership with Oxford Economics to estimate the benefits of aviation on the economies of over 80 countries around the world. The analysis leverages the traditional economic footprint of the industry (measured by aviation's contribution to GDP, jobs, and tax revenues generated by the sector and its supply chain), and makes one of the first attempts to estimate the sector's connectivity benefits. The author finds that the aviation sector, by providing connectivity, has an extremely relevant direct and wider impact on jobs and GDP globally, contributing over 22 million jobs and US\$1.4 trillion in GDP. Moreover, the aviation sector contributes to other industries as well, by facilitating their growth and supporting their operations. With a majority of international tourists depending on air transport, the aviation industry supports 34.5 million jobs within tourism globally, contributing around US\$762 billion a year to world GDP.

Yet the benefits go beyond this economic footprint of aviation. The author finds that the global connectivity

that air transport facilitates has positive impacts that enhance overall productivity and economic growth in the long run. Given the increase in global connectivity from air transport over recent decades, Oxford Economics estimates this benefit is valued at over US\$200 billion of global GDP. Exploring potential relationships between the results of the Oxford Economics studies on the benefits of aviation and the TTCI, the author finds some interesting links. In particular, she finds a significant positive relationship between the 5th pillar of the Index, prioritization of Travel & Tourism, and the air transport connectivity measure relative to GDP. This suggests that making Travel & Tourism a government priority can enable development of global connectivity through aviation, which in turn enhances the overall level of productivity and living standards in the long run.

In "Travel & Tourism as a Driver of Employment Growth," Rochelle Turner of WTTC and Zachary Sears of Oxford Economics present recent findings related to job creation in Travel & Tourism. Using proprietary data for 20 countries, including both emerging and advanced economies, they find that Travel & Tourism is one of the most important industries in terms of absolute size of employment and economic output.

The authors describe how industry employs more than 98 million people directly, representing over 3 percent of overall global employment. When indirect and induced impacts are included, they calculate that the industry contributes to around one in every eleven jobs worldwide.

They also describe how the industry can drive domestic investment and attract foreign direct investment, with positive outcomes for employment creation, income generation, and additional quality-of-life benefits for local residents. On a comparative scale, the authors explain that Travel & Tourism makes a larger economic contribution to the global economy than some notable high-profile sectors, making it an important industry to support economic development.

Finally, they benchmark the sector against selected sectors for all regions of the world—many of which have recently benefitted from overt and well-publicized government support—such as mining; education; chemicals manufacturing, including drugs and medicines; automotive manufacturing; communications and telecommunications; and financial services. Their analysis indicates that, across every region of the world, the share of world employment in Travel & Tourism is greater than that for the automotive manufacturing and chemicals manufacturing industries combined. Furthermore, the industry is estimated to have a relatively more positive outlook in terms of job growth than the forecast for total jobs in the global economy, meriting serious attention from policymakers.

In their chapter "Competitiveness, Jobs, and Green Growth: A "Glocal" Model," Geoffrey Lipman of

Greenearth.travel and Victoria University Melbourne, with Terry Delacy and Paul Whitelaw of Victoria University Melbourne, present the conceptual and operational research led by the Victoria University Centre for Tourism and Services Research to create a system where destinations can identify optimum green growth development scenarios for Travel & Tourism, to sustainably build wealth and create jobs. The authors present a conceptual global framework for green growth and travelism and show how adjusting it to the local level allowed for a major strategic visioning effort (conducted in Bali Indonesia in 2012), which has resulted in the Green Growth 2050 Roadmap.

The authors also present some of the tools used to support the process (for example, the coordinated resident and visitor survey model), while implementing Green Economy Tourism System (GETS) models to take advantage of the large datasets available to sustain better decision support systems. They conclude with a description of their ongoing work, which is aimed at creating a methodology to quantify the socioeconomic impact of new investments in the T&T sector with a particular emphasis on job creation.

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# Part 1

## **Selected Issues of T&T Competitiveness**



# The Travel & Tourism Competitiveness Index 2013: Contributing to National Growth and Employment

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Two years after the last edition of *The Travel & Tourism Competitiveness Report*, the world economy remains somewhat fragile. Growth in emerging markets is returning tentatively, but rising inequalities, macroeconomic concerns, and high unemployment—particularly among the young—continues to afflict many advanced economies.

Despite the mixed global economic picture, prospects for the Travel & Tourism (T&T) industry are not entirely gloomy. According to the World Tourism Organization (UNWTO), international tourist arrivals grew by 4 percent between January and August 2012 compared with the same period in 2011, and total expenditure on tourism has also increased. Although most of the increase in spending was from travelers from developing countries such as Brazil, China, and Indonesia, advanced-economy travelers—even those from economies where the economic outlook appears more pessimistic—increased their spending. Even amid shrinking household and business budgets, spending on travel is continuing, although the structure is changing. While the frequency, distance, and length of international trips tend to be shorter, the number of international travelers has increased—perhaps indicating that travel is increasingly seen as necessity rather than a luxury.

Travel & Tourism remains a critical sector for development and economic growth for advanced and developing economies alike. Developing a strong T&T sector supports job creation, raises national income, and also benefits the general competitiveness of economies through improvements in hard and soft infrastructure (as highlighted by Global Agenda Issue Survey; see Box 1).

Additionally, the industry is adapting to the changing international context and showing progress on multiple fronts. Some of the most important advances are in elements that affect aviation (see Box 2).

Given the importance of the T&T industry for economic development, seven years ago the World Economic Forum, with its Industry and Data Partners, embarked on a multi-year effort with industry experts to analyze the factors and policies that make it attractive to develop the T&T industry in different countries. The result of this effort is the *Travel & Tourism Competitiveness Report* series, with, at its heart, the Travel & Tourism Competitiveness Index (TTCI).

Through detailed analysis of each pillar and subpillar of the Index, businesses and governments can better understand the particular challenges to the sector's growth and then formulate appropriate policies and actions to tackle weaknesses.

This *Report* aims to serve two purposes. First, by providing a cross-country analysis of the drivers of T&T competitiveness, we intend to provide the industry with useful comparative information and an important benchmarking tool for making decisions related to business and industry development. Second, the

### Box 1: Priority issues for Travel & Tourism: Perspectives from the Global Agenda Issue Survey

We live in a highly complex, interdependent, and interconnected era. Companies are increasingly confronted by major adaptive challenges as well as profound transformational opportunities. To be successful in this new context requires organizations in every sector of society to master strategic agility and build resilience to risk. Indeed, Resilient Dynamism was the theme of the World Economic Forum's 2013 Annual Meeting, where discussions centered on how best to facilitate global, regional, and industry transformations to cope most effectively with today's complexity.

Each year, in an effort to better understand what is on the minds of the world's leaders, the World Economic Forum carries out a survey of experts from business, government, academia, and civil society. Their responses shape our agenda, initiatives, and activities, including the program of the Annual Meeting in Davos. In July 2012, the most recent Global Agenda Issue Survey was sent to nearly 2,800 individuals in business and non-business sectors; it generated more than 800 responses from chief executive officers and senior executives and government, academic, and civil society leaders.

The most critical issues identified through the survey include major systemic financial failure, chronic fiscal imbalances, severe income disparities, and persistent structural unemployment. These results are perhaps not surprising, given recent global geopolitical and economic difficulties.

In addition, a deep dive into the results from business-sector respondents alone showed differences of perception between respondents from various industry sectors. Although some commonalities do exist (e.g., all sectors are highly concerned about chronic fiscal imbalances and major systemic financial failure), the survey revealed some important differences.

For example, one issue that is perceived as more critical for the mobility industries than for others is the presence of constraints in critical infrastructure. Respondents from the sector were also particularly concerned about the ease of movement of goods across borders and disruptions in supply chains, issues that they are eager to address as an industry.

More specifically, the priority issues identified through the survey for the aviation and travel community include:

- rising protectionism,
- consolidation and liberalization,
- emerging-market challenges, and
- travel facilitation and eVisa programs.

The survey helped us to identify issues that remain high on the global agenda as well as those that are priority themes for the T&T sector. These are areas that the World Economic Forum will continue to explore through *The Travel & Tourism Competitiveness Report*, the Open Borders Initiative, and other related workstreams.

analysis provides an opportunity for the T&T industry to highlight for 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. Indeed, since its introduction, the *Report* has become an important component in the toolkits of government ministries around the world.

This year's *Report*, published under the theme "Reducing Barriers to Economic Growth and Job Creation," explores and highlights the relevance of the T&T industry in generating new jobs and fostering economic development. The Forum is committed to publishing this *Report* every two years in an effort to ensure that it continues to provide a leading strategic tool for both business and governments to use in creating blueprints for sustainable and viable T&T development.

### THE TRAVEL & TOURISM COMPETITIVENESS INDEX

The TTCI has been developed within the context of the World Economic Forum's Industry Partnership Programme for the Aviation, Travel & 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 & Company and our Data Partners Deloitte, the International Air Transport Association (IATA), the International Union for Conservation of Nature (IUCN), the 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, namely Airbus/EADS, BAE Systems, the Bahrain Economic Development Board, Bombardier, Delta, Deutsche Lufthansa/Swiss, Embraer, Etihad Airways, Hilton, Jet Airways, Lockheed Martin, Marriott, Safran, Starwood Hotels & Resorts, and VISA.

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: (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.

Each of these three subindexes is composed in turn by 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. The figure also shows a notional 15th pillar on climate change. Although we acknowledge its importance for the future of the T&T sector, data constraints and difficulties related to measuring various aspects of this phenomenon prevent us from including the concept in the calculation. It remains our intention to integrate this pillar into the Index in the future as reliable data become available.

Each of the pillars is, in turn, made up of a number of individual variables. The dataset includes both survey data from the World Economic Forum's annual Executive Opinion Survey (the Survey), and quantitative data from publicly available sources, international organizations, and T&T institutions and experts (for example, IATA, the IUCN, the UNWTO, WTTC, the United Nations Conference on Trade and Development [UNCTAD], and the United Nations Educational, Scientific and Cultural Organization [UNESCO]). The Survey is carried out among chief executive officers 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 that which 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, the openness of the bilateral Air Service Agreements into which the government has entered with other countries, and the commitments made within the international trade regime to opening tourism and travel services under the General Agreement on Trade in Services (GATS).

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 it less attractive to develop the T&T sector 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. Access to improved drinking water and sanitation within a country 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 Travel & Tourism is a sector of primary concern, and by reflecting this in its budget priorities, the government can channel needed funds to essential development projects for the T&T sector. This can also send a signal of the government's 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 government efforts to

## Box 2: The A to Z of aviation and T&T trends, 2013

The World Economic Forum's Aviation & Travel Community has identified a number of critical trends for the industry:<sup>1</sup>

**ALLIANCES** The year 2012 has seen its share of alliances, mergers, acquisitions, and strategic investment activities. Notwithstanding the legal and regulatory hurdles, a number of carriers now see a benefit in strategic investments: Etihad has a 29 percent stake in Air Berlin, Air Asia has a 20 percent stake in Malaysian Airlines, Qatar has a 35 percent stake in Cargolux, and Delta has recently acquired 49 percent of Virgin Atlantic. With the US Airways–American Airlines merger creating the world largest airline and mid-tier airlines seeking investment in Europe, this trend should continue in 2013. The same trend is seen in the online travel services industry, with the latest acquisition of Kayak by Priceline.

**BARRIERS** Structural barriers such as market access, trade, and environmental constraints have been the biggest impediments to the sustained growth of transport and the travel sector. Reform will be necessary to avoid a rise of protectionism that hampers industry growth.

**COMPETITIVENESS** According to the World Travel & Tourism Council, the Travel & Tourism (T&T) sector currently accounts for 9 percent of GDP—a total of US\$6 trillion. It generates 120 million direct jobs and another 125 million indirect jobs—that comes to one in eleven jobs on the planet.<sup>2</sup> With Travel & Tourism being a key sector for many emerging and developed economies, understanding at a political level how to eliminate its structural barriers is essential. Competitiveness in the global manufacturing sector is a crucial issue for aerospace manufacturers because of the increased complexity of issues arising from managing global value chains.

**DATA** Advances with analytics are identifying “best customers,” building loyalty, and improving operations using customer reviews and social media as a management tool. Big Data is also affecting the travel industry in areas that range from online bookings to the traveler's service experience in the hotel.

**EMISSIONS** The inclusion of international aviation emissions in the European Union's Emission Trading System, which caused political backlash in many countries, has been suspended on the premise that a global framework to regulate aviation emissions will be agreed on at the next International Civil Aviation Organization (ICAO) General Assembly in 2013. Will the ICAO General Assembly be able to deliver a global framework?

**FUEL** The erratic and now impossibly difficult task of predicting fuel price changes is leading the aviation industry to either look at new business models (e.g., Delta's acquisition of the Phillips 66 refinery in Pennsylvania) to offset possible hikes, or search for a way to kick-start commercial production of alternative fuels plants for flight. Will 2013 see a breakthrough in the commercial production of alternative fuels for aviation?

**GDS** Global distribution systems are coming under more pressure to innovate, and the International Air Transport Association (IATA) is calling for a standard for a new distribution capability. Multimillion dollar airline product investments cannot break free of product descriptions limited to booking classes such as first class, business class, and economy class and their derivatives. Personalized offers based on availability, customer needs, preferences, or histories are effectively impractical in the current structure.

**HEADWINDS** An anemic global economy and a weak growth forecast have been the headlines of 2012. It was a terrible year for the euro zone, and the region's instability caused great concern for European carriers as well as Europe's travel and hospitality industry. The looming United States' “fiscal cliff” provided no respite either. The outlook for growth in Europe and the United States in 2013 remains uncertain and low at best. This gloomy point of view will definitely have repercussions on the transport, travel, and hospitality sectors.

**INTEGRATION** Passengers are demanding a seamless travel experience. Given the technological advances in the different transportation modes, intermodal integration is perceived as a solution to the many transport problems facing modern societies (e.g., rising levels of accidents and emissions and noise from transport), and it plays an important role by enabling better mobility for the traveler. Integration can also help carriers rethink how they can maximize the effectiveness of their networks. Intermodal integration is already on European policymakers' agendas, and new business models tackling this need are emerging.

**JOBS** According to Oxford Economics, workers who begin their careers in the travel industry have greater access to educational opportunities, enjoy better career progression, and achieve higher wages. Moreover, at a time of high unemployment, especially among youth, the aviation and travel industries remain a resilient vector of growth in many countries that have growing employment figures despite the economic crisis. WTTC is expecting that, by 2022, the T&T industry it will account for 328 million jobs, or one in every eleven jobs on the planet.<sup>3</sup>

**KYOTO** The Kyoto Protocol was set to expire in 2012. At the same time, international climate diplomacy remains fairly intractable, although discussions are continuing under the UN Framework. The outcomes of the meetings in Doha in December 2012 had a fairly limited impact on environmental regulations and action plans intended to reduce the sector's emissions at both domestic and international levels.

**LEISURE** Inbound and domestic leisure travel spending generated 76.0 percent of direct T&T GDP in 2011 (US\$3,056.9 billion), compared with 24.1 percent for business travel spending (US\$968.4 billion). With the new middle class in emerging countries, leisure travel will continue to outgrow business travel, which is already maturing in many emerging countries.

**MOBILE** From online to mobile, new communication platforms are being used for searching, choosing, and—to a certain degree—booking travel and accommodations in most countries for medium-cost travel. However, will online become the method-of-choice for booking high-end travel where human interface and concierge-like services are still important, and for emerging markets where travel agents still play an important role? Social local mobile applications have become more prevalent in 2012, with companies such as rome2rio and Airbnb. Will these new companies significantly change the business models of travel and stay?

**NEXTGEN** The budget, delay, and governance issues in implementing next-generation air traffic management systems, such as NextGen in the United States and the Single European Sky in Europe, will continue to occupy the attention of the industry in 2013.



## Box 2: The A to Z of aviation and T&T trends, 2013 (cont'd.)

**OPEN SKIES** Government regulation has not kept pace with the commercial realities of operating global airlines. Few highly capital-intensive global industries remain as fragmented as the airline industry. Over the years, the multilateral approach has given way to bilateral deals between countries to open their skies to each other. In 2013, the International Civil Aviation Organization (ICAO) is committed to putting forward an action plan for a global regulatory framework that will address impediments in areas such as air carrier ownership and control, market access, consumer protection, and taxation.

**PERSONALIZATION** Customer expectations in the aviation and travel industry have never been higher, and they are increasing with the new social and mobile technology at hand. Consumers in the future will want their travel experience to be personalized. Despite technological availability, in order to deliver on this consumer expectation, the travel and hospitality industry will need to address regulatory, infrastructure, and financial constraints and be able to create new business models.

**QUAKES** Earthquakes and other natural disasters (e.g., plumes of volcanic ash, tsunamis, violent storms such as Superstorm Sandy, and flooding) continue to impact Travel & Tourism. Despite the resilience the industry has learned to build into its operations to manage unexpected events, it will require not only smart regulation to avoid inappropriate responses, but also an update of regulations that hinder timely and effective response and damage the industry.

**RESILIENCE** The industry is resilient. Year-to-date T&T performance, especially international demand, remains impressively solid against a difficult economic backdrop. However, annual growth is slower now than it was in 2011, and it is evident that this slowdown in growth is continuing across a range of industry indicators.

**SLOWDOWN** Even though they still account for the bulk of the world travel growth, the increase in travelers from Latin America, the Middle East, and Asia has diminished while the growth of Brazil, China, and India faced a sustained slowdown as the euro zone crisis takes its toll.

**TECHNOLOGY** Information technology is everywhere—iPads are now used even in cockpits. The ability to stay connected is gaining momentum, and 2012 was no exception. In 2013, companies should consider providing more, faster, and higher-quality connectivity in cabins on planes, boats, and trains, as well as developing new applications that would allow travelers to self-check into hotels, car rentals, and so on.

**UP-AND-COMING** Low-cost carriers are making a big entry into emerging markets, especially Africa (with Sir Stelios's fastjet). And their role in Latin America is increasingly important, with companies such as GOL Linhas Aereas Inteligentes S.A. allowing more middle-class travel on the continent. New players are found in all industry segments: Google now has a part in global distribution systems, booking and selling tickets for multiple carriers; startups in hospitality (Airbnb, HomeExchange, CouchSurfing) are plentiful. Google's plans to enter the travel reservation space are not news, but new applications—such as Google Glasses, which might allow travelers to visit a cultural site and, through the augmented reality they provide, actually experience what it looked like in the past, thereby obviating the need for tour guides—could prove to be revolutionary for the industry.

**VISA** Visa facilitation and simplification were the mantras of tourism industry players and were slated for sweeping reforms by President Calderon at the G-20 meeting in Los Cabos. Visa facilitation reforms were initiated by President Obama as a strategic priority for the United States to stimulate economic growth and job creation. The important link between facilitation of travel and the creation of jobs was successfully made in a joint study by the World Travel & Tourism Council (W TTC) and the World Tourism Organization (UNWTO), supported by the Forum's New Models for Travel & Tourism Global Agenda Council. The issue will continue to be a top priority of many nations and regional associations in 2013.

**WARS** The war on terrorism continues not only at the political level but also at the industrial and societal levels. Travel has become more frustrating and invasive, with long waits at security check points. Cybercrimes, which can present huge security concerns at borders, are the plague of the 21st-century fight against an enemy without a face. New government agencies have been trying to provide responses to un-nameable, and undefinable, threats.

**X-FACTOR** Uncertainty is the new norm. Risk management techniques have improved so that they always now account for the unknown—the x-factor. New discoveries and emergent phenomena may impact economies, companies, and individuals in unforeseen ways. New information technology has the potential to revolutionize the industry, with innovations ranging from driverless vehicles to complete, virtual, 3D meeting technology—and the industry must be ready.

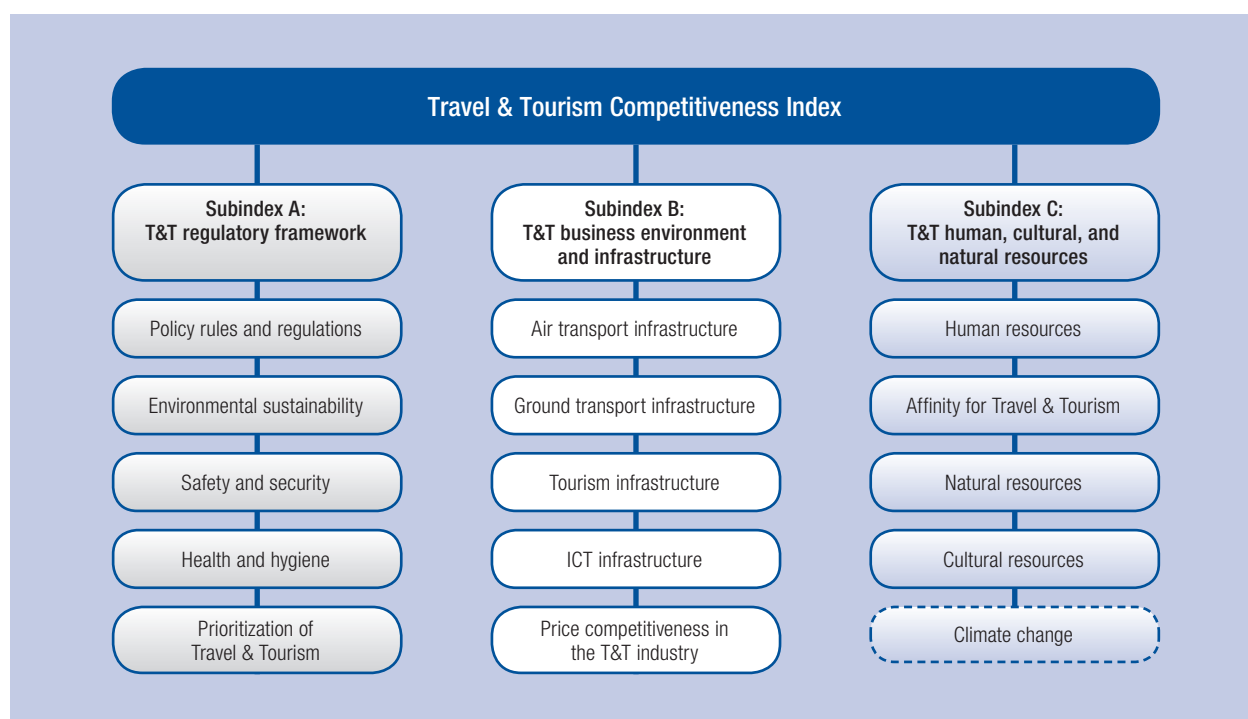
**YOUTH** The travel needs of the Millennial Generation differ from those of previous generations. Social and mobile T&T practices will be required to address them. Personalization and affiliation seem to be the characteristics of these new Millennials. For example, the average Millennial can switch among 27 different media in an hour. Evolving business models are likely to emerge as a consequence.

**ZERO** Zero environmental impact is the long-term goal to which eco-aviation and eco-hospitality aspire. The industry has done much to demonstrate its commitment to a low-carbon economy through the active demonstration of alternative, optimized operations such as retrofitting, recycling, and preserving rainforests and reforestation, but more needs to be done to integrate people into the process. The industry has done a fantastic job in talking to itself. But the public—customers and passengers—still perceives the industry as being a heavy polluter. Integrating passengers and customers as stakeholders in working groups to address this issue should become best practice for the future. If the public understands what they stand to benefit by reducing the environmental impact of Travel & Tourism, political barriers will be easier to remove.

### Notes

- 1 The Aviation & Travel Community comprises selected member companies of the World Economic Forum that are actively involved in pursuing the Forum's mission at the industry level. The Community brings visibility and insight to strategic decision-making on the most important industry- and cross-industry related issues, as well as the opportunity to engage in acts of global corporate citizenship.
- 2 W TTC 2013.
- 3 W TTC 2013.

Figure 1: Composition of the three subindexes of the TTCI



collect and make available T&T data on a timely basis 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 a country is the extensiveness and quality of its **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.

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 its financial infrastructure for tourists (the availability of automatic teller machines, or ATMs).

Given the increasing importance of the online environment for the modern T&T industry in 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, mobile telephony, and broadband), which provide a sense of the access by business and individuals to the online services that are essential for operating in the modern T&T industry. We also include a specific measure of the extent to which the Internet is used by businesses in carrying out transactions with other business and consumers, 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) as well as airfare ticket taxes and airport charges (which can make flight tickets much more expensive), fuel price levels compared with those of other countries, taxation in the country (which can be passed through to travelers), and the relative cost of hotel accommodations.

Quality **human resources** in an 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 a 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. This year we also introduce an indicator measuring the extent to which businesses are focused on customer satisfaction.

It is clear that **natural resources** are another 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 nationally protected areas, for which this year we rely on newly available, more reliable data.

Finally, the **cultural resources** at each country's disposal are another critical driver of T&T competitiveness around the world. In this pillar we include the number of UNESCO cultural World Heritage sites, sports stadium seat capacity, and the number of international fairs and exhibitions in the country, as well as a measure of its creative industries exports, which provides an indication of cultural richness.

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 TTCl are shown in Appendix A; detailed rankings and scores of this year's Index are found in Appendix B.

## ADJUSTMENTS TO THE TTCl

A few minor adjustments have been made to the TTCl structure in this edition to ensure that the Index remains highly relevant:

- Within the *Policy rules and regulations pillar (1st)*, the indicator *Visa requirements* (1.04), has been updated to include the case of electronic visas (eVisas) alongside the other visa possibilities. This has become necessary because of the increasing relevance of the facilitation of visa processes in the policy debate.
- Within the *ICT infrastructure pillar (9th)*, the indicator *Extent of business Internet use* has been replaced by two more specific indicators. These are *ICT use for business-to-business transactions* and *ICT use for business-to-consumer transactions*, and are based on the Executive Opinion Survey. Also, an indicator measuring *Mobile broadband subscriptions* has been added to this pillar. These changes reflect the growing importance of ICTs for the tourism industry's operations as well as their role as tools for travelers.
- Within the *Affinity for Travel & Tourism pillar (12th)*, an indicator measuring the *Degree of customer orientation* was added because of the importance of customer satisfaction in the T&T sector.
- Finally, within the *Natural resources pillar (13th)*, the variables used to compute the extent of *Protected areas* have been replaced by the indicators *Terrestrial biome protection* and *Marine protected areas*. These changes should be regarded as data improvements, using more sophisticated and accurate measures, and are in line with the World Economic Forum's work on Sustainable Competitiveness.<sup>1</sup>

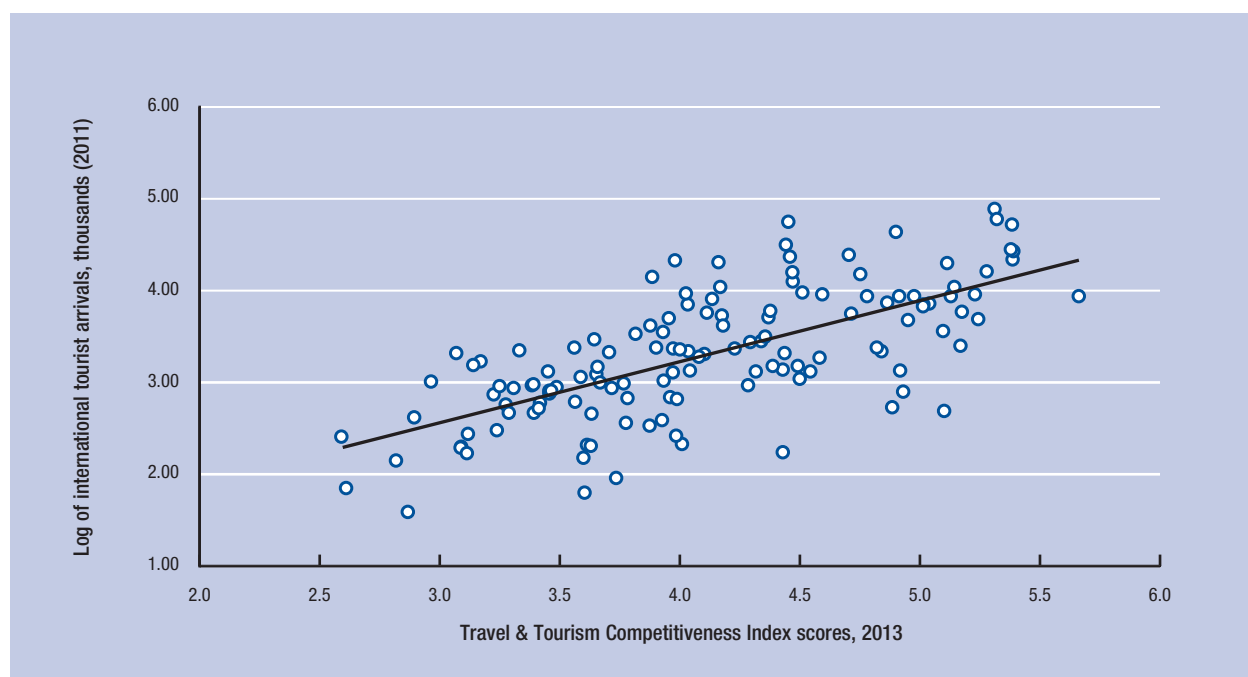
## COUNTRY COVERAGE

Six new economies have been included in the analysis this year. These include three new African countries (Seychelles, Guinea, and Sierra Leone); one Middle Eastern country (Yemen); and two countries in the Americas (Haiti and Suriname, which was reinstated after being absent in the last edition because of a lack of data). On the other hand, five countries covered in the last *Report*—Angola, Libya, Syria, Timor-Leste, and Tunisia—are not covered this year because of insufficient or unreliable data. Thus this year's edition has a net increase in country coverage for a total of 140 economies this year—one more than in the 2011 *Report*—covering all of the world's regions and accounting for over 98 percent of world GDP.

Table 1: The Travel &amp; Tourism Competitiveness Index 2013 and 2011 comparison

Country/Economy	2013		2011	
	Rank/140	Score	Rank/139	
Switzerland	1	5.66	1	
Germany	2	5.39	2	
Austria	3	5.39	4	
Spain	4	5.38	8	
United Kingdom	5	5.38	7	
United States	6	5.32	6	
France	7	5.31	3	
Canada	8	5.28	9	
Sweden	9	5.24	5	
Singapore	10	5.23	10	
Australia	11	5.17	13	
New Zealand	12	5.17	19	
Netherlands	13	5.14	14	
Japan	14	5.13	22	
Hong Kong SAR	15	5.11	12	
Iceland	16	5.10	11	
Finland	17	5.10	17	
Belgium	18	5.04	23	
Ireland	19	5.01	21	
Portugal	20	5.01	18	
Denmark	21	4.98	16	
Norway	22	4.95	20	
Luxembourg	23	4.93	15	
Malta	24	4.92	26	
Korea, Rep.	25	4.91	32	
Italy	26	4.90	27	
Barbados	27	4.88	28	
United Arab Emirates	28	4.86	30	
Cyprus	29	4.84	24	
Estonia	30	4.82	25	
Czech Republic	31	4.78	31	
Greece	32	4.75	29	
Taiwan, China	33	4.71	37	
Malaysia	34	4.70	35	
Croatia	35	4.59	34	
Slovenia	36	4.58	33	
Panama	37	4.54	56	
Seychelles	38	4.51	n/a	
Hungary	39	4.51	38	
Montenegro	40	4.50	36	
Qatar	41	4.49	42	
Poland	42	4.47	49	
Thailand	43	4.47	41	
Mexico	44	4.46	43	
China	45	4.45	39	
Turkey	46	4.44	50	
Costa Rica	47	4.44	44	
Latvia	48	4.43	51	
Lithuania	49	4.39	55	
Bulgaria	50	4.38	48	
Brazil	51	4.37	52	
Puerto Rico	52	4.36	45	
Israel	53	4.34	46	
Slovak Republic	54	4.32	54	
Bahrain	55	4.30	40	
Chile	56	4.29	57	
Oman	57	4.29	61	
Mauritius	58	4.28	53	
Uruguay	59	4.23	58	
Jordan	60	4.18	64	
Argentina	61	4.17	60	
Saudi Arabia	62	4.17	62	
Russian Federation	63	4.16	59	
South Africa	64	4.13	66	
India	65	4.11	68	
Georgia	66	4.10	73	
Jamaica	67	4.08	65	
Romania	68	4.04	63	
Lebanon	69	4.04	70	
Indonesia	70	4.03	74	
Morocco	71	4.03	78	
Brunei Darussalam	72	4.01	67	
Peru	73	4.00	69	
Sri Lanka	74	3.99	81	
Macedonia, FYR	75	3.98	76	
Ukraine	76	3.98	85	
Albania	77	3.97	71	
Azerbaijan	78	3.97	83	
Armenia	79	3.96	90	
Vietnam	80	3.95	80	
Ecuador	81	3.93	87	
Philippines	82	3.93	94	
Trinidad and Tobago	83	3.93	79	
Colombia	84	3.90	77	
Egypt	85	3.88	75	
Dominican Republic	86	3.88	72	
Cape Verde	87	3.87	89	
Kazakhstan	88	3.82	93	
Serbia	89	3.78	82	
Bosnia and Herzegovina	90	3.78	97	
Namibia	91	3.77	84	
Gambia, The	92	3.73	92	
Honduras	93	3.72	88	
Botswana	94	3.71	91	
Nicaragua	95	3.67	100	
Kenya	96	3.66	103	
Guatemala	97	3.65	86	
Iran, Islamic Rep.	98	3.64	114	
Mongolia	99	3.63	101	
Suriname	100	3.63	n/a	
Kuwait	101	3.61	95	
Moldova	102	3.60	99	
Guyana	103	3.60	98	
El Salvador	104	3.59	96	
Rwanda	105	3.56	102	
Cambodia	106	3.56	109	
Senegal	107	3.49	104	
Zambia	108	3.46	111	
Tanzania	109	3.46	110	
Bolivia	110	3.46	117	
Kyrgyz Republic	111	3.45	107	
Nepal	112	3.42	112	
Venezuela	113	3.41	106	
Tajikistan	114	3.41	118	
Paraguay	115	3.39	123	
Uganda	116	3.39	115	
Ghana	117	3.38	108	
Zimbabwe	118	3.33	119	
Swaziland	119	3.31	116	
Ethiopia	120	3.29	122	
Cameroon	121	3.27	126	
Pakistan	122	3.25	125	
Bangladesh	123	3.24	129	
Malawi	124	3.22	121	
Mozambique	125	3.17	128	
Côte d'Ivoire	126	3.15	131	
Nigeria	127	3.14	130	
Burkina Faso	128	3.12	132	
Mali	129	3.11	133	
Benin	130	3.09	120	
Madagascar	131	3.09	127	
Algeria	132	3.07	113	
Yemen	133	2.96	n/a	
Mauritania	134	2.91	136	
Lesotho	135	2.89	135	
Guinea	136	2.88	n/a	
Sierra Leone	137	2.87	n/a	
Burundi	138	2.82	137	
Chad	139	2.61	139	
Haiti	140	2.59	n/a	

Figure 2: T&amp;T competitiveness and tourist arrivals



### THE TRAVEL & TOURISM COMPETITIVENESS INDEX RANKINGS 2013

Table 1 shows the overall rankings of the TTCI, comparing this year's rankings with those from the 2011 edition of the *Report*, showing all economies ranked together. The results are positively correlated with a number of T&T indicators. For example, Figures 2 and 3 show the correlation between the 2013 TTCI scores and tourist arrivals (log form, 2011) and between the TTCI scores and tourism receipts (log form, 2011). 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 relationship has held since the Index first appeared in 2007, supporting the idea that the TTCI captures factors that are important for developing the T&T industry.

### TOP THREE PERFORMERS IN EACH PILLAR OF THE TTCI

Table 2 shows the rankings of those economies demonstrating the top three performances in each of the 14 pillars of the TTCI.

Singapore, Hong Kong, and New Zealand retain the top three ranks in the policy rules and regulations pillar. These economies continue to have the most conducive overarching policy environments for the development of the T&T sector, including active policies toward attracting foreign investment and developing the T&T sector, and a minimum of red tape required in setting up new businesses. They are joined in the top 10 by two other Asian economies—Taiwan and Malaysia.

Sweden, Switzerland, and Finland hold the top three spots in the environmental sustainability pillar. These countries are characterized by environmental legislation that is both stringent and well enforced, a specific focus on developing the tourism sector in a sustainable way, and good overall environmental outcomes in terms of low levels of pollution and environmental damage. Also in the top 10 among countries shown in the table are Germany, Denmark, Austria, Finland, Norway, and Ireland, which all demonstrate a significant focus on protecting the environment.

Safety and security is another area where European countries perform well, with Finland and Switzerland at the top and several others in the top 10. Two Asian “tigers” also appear in the top 10, with Hong Kong advancing to the third spot and Singapore rising to fifth place. These economies have very low levels of crime and violence, and they all benefit from effective police forces. They are not overly concerned by the threat of terrorism, and they also benefit from roads that are safe by international standards, with few deaths caused by road traffic accidents.

Austria and Germany receive the best assessments for health and hygiene, showing various strengths such as high levels of access to clean drinking water and sanitation and good health infrastructure. They are able to reassure international travelers that they will not run into health issues when traveling there.

Seychelles enters the TTCI for the first time this year, taking 1st place for the prioritization of Travel & Tourism; the country is joined by Cyprus and Mauritius at the top. Other well-known tourism destinations—such as Barbados, Malta, Jamaica, and Spain—are

Figure 3: T&amp;T competitiveness and tourism receipts



also in the top 10. This is perhaps not surprising given the importance of the sector for their economies. This standing is borne out not only by high government expenditure on the sector but also by a holistic approach in supporting the sector that includes strong destination-marketing campaigns and country-level presence at key international tourism fairs.

The air transport infrastructure pillar is led by Canada and the United States, with the United Arab Emirates coming in 3rd, indicating the country's growing relevance as international air transport hub. Australia, the United Kingdom, and Hong Kong follow. These economies are either vast areas that require a strong domestic air transport to connect them, or they are international centers. They are all characterized by the presence of important airport hubs, several flights per capita and a high number of operating airlines, and high-quality service.

The best ground transport infrastructure is found in Hong Kong, Singapore, and Switzerland. All three have high-quality roads, railroads, and ports, and all are also characterized by ground transport networks that work together seamlessly. Travelers in these economies can get from one place to another without hassle or complication, increasing their attractiveness as destinations.

The tourism infrastructure pillar is dominated at the very top by European countries, topped by Austria and Italy, which are tied at 1st place, while Greece is ranked 3rd; the remainder of the top 10 includes Spain, Switzerland, and Croatia. Visitors to these countries have many hotels to choose from, excellent car rental facilities, and many ATMs for withdrawing cash. In other words,

visitors have choices in how they visit, travel, and move around in these countries, and they have the necessary facilities for a comfortable stay.

The ICT infrastructure pillar is increasingly dominated by Asian economies. Korea and Hong Kong are the leaders, with Sweden in 3rd place, with high penetration rates of ICTs and a good use of the Internet for business transactions. Japan and Singapore are another two Asian economies in the top 10. The availability of strong ICT infrastructure is becoming more and more important for the general economy as well as for the T&T industries in these economies, which have become increasingly dependent on such tools for reservations, marketing, and distribution.

The price competitiveness pillar is topped by Iran, Brunei Darussalam, and Gambia, which all benefit from low fuel costs and low ticket taxes and airport charges. Gambia also offers the most competitive hotel prices in the assessment. Also in the top 10 appear countries such as Malaysia and Indonesia, which offer tourists good value for the money they spend.

Switzerland, Singapore, and Iceland once again hold the top three spots in the human resources pillar. These countries have strong educational systems as well as top-notch training facilities and healthy workforces. In addition, they are characterized by flexible labor markets and significant ease in hiring foreign labor, which makes it much easier to manage the seasonal hiring that is so critical for the T&T industry.

The countries with the top three assessments for the affinity for Travel & Tourism are Lebanon, Barbados, and Hong Kong. All three display great openness to foreign travelers, and their business communities

Table 2: Top three performing economies per pillar

Country/Economy	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	Cultural resources
Australia	14	56	13	40	39	4	49	20	18	137	22	38	2	20
Austria	37	6	7	1	22	30	15	1	20	131	17	12	49	12
Barbados	41	27	32	28	8	32	9	26	19	113	23	2	133	50
Brazil	119	30	73	70	102	48	129	60	55	126	62	83	1	23
Brunei Darussalam	126	135	24	65	123	45	67	86	65	2	36	63	53	95
Canada	10	41	18	53	37	1	33	21	23	124	5	34	10	16
Cyprus	88	38	27	45	2	36	19	5	40	102	24	10	96	48
Finland	7	3	1	15	53	11	20	44	13	118	4	64	54	26
Gambia, The	65	34	84	105	25	81	50	126	110	3	111	21	114	121
Germany	33	4	14	2	77	7	6	23	11	125	18	61	31	4
Greece	98	72	69	13	28	20	58	3	33	127	50	55	40	25
Hong Kong SAR	3	118	3	50	12	6	1	71	2	32	8	3	84	42
Iceland	48	19	4	7	5	17	38	9	8	121	3	11	63	57
Iran, Islamic Rep.	124	101	106	79	130	102	76	133	93	1	87	128	74	45
Italy	100	53	44	29	79	24	39	1	31	134	41	72	34	7
Kazakhstan	99	124	99	3	90	82	80	87	48	73	71	121	120	117
Korea, Rep.	50	69	39	19	75	31	16	51	1	96	33	81	89	10
Lebanon	115	127	116	33	38	67	110	27	84	68	64	1	136	68
Mauritius	28	77	36	66	3	60	37	48	69	75	49	6	134	110
New Zealand	2	22	9	17	21	12	46	11	22	74	13	17	26	52
Seychelles	55	70	91	63	1	27	31	29	58	120	56	5	65	64
Singapore	1	23	5	56	4	14	2	38	9	66	2	8	92	35
Spain	67	25	23	24	10	10	10	5	28	106	34	39	29	1
Sweden	16	1	8	38	74	19	17	36	3	129	12	33	45	2
Switzerland	17	2	2	10	11	9	3	5	6	139	1	25	19	6
United Arab Emirates	13	91	50	61	36	3	26	24	39	35	15	24	71	33
United Kingdom	8	7	22	48	40	5	13	22	10	138	6	45	15	3
United States	23	112	57	51	30	2	27	13	17	94	14	69	3	5

express their sense of the great value of the tourism on offer in their respective economies.

The top countries in the natural resources pillar span four continents: Brazil, Australia, the United States, and Tanzania. All host several World Heritage natural sites, have wide expanses of protected land, and boast a rich fauna as measured by the total number of known species living in them. These countries have the great fortune to be endowed with inherent attractions for tourists interested in nature tourism, yet they also bear the responsibility of protecting some of the most essential ecosystems on the planet.

Finally, at the top of the cultural resources pillar—which takes into account attributes such as the number of World Heritage cultural sites, creative industries' exports, and sports stadium capacity—we find Spain, Sweden, and the United Kingdom, with Italy and France also in the top 10. All these countries have many World

Heritage cultural sites and are among the leading exporters of creative industries' products, such as movies and music. They also organize many international fairs and exhibitions and have a high sports stadium capacity. These attributes come together to provide a variety of cultural attractions for leisure and business visitors.

More details on the T&T competitiveness of specific economies will be discussed in the section below.

## REGIONAL RANKINGS

This section will consider some of the highlights of the rankings in a regional context, grouping countries into the following five regional groups: Europe, the Americas, Asia Pacific (including Central Asia), the Middle-East and North Africa, and sub-Saharan Africa. For further details for each of the 140 economies included in this Index, we provide two-page profiles in Part 2 of the *Report*. The

profiles show their rankings on each subindex and pillar, as well as those on each of the 79 indicators included in the Index.

## Europe

In line with statistics on international tourist arrivals, Table 1 shows that Europe remains the leading region for Travel & Tourism competitiveness, with all of the top five places taken by European countries. Likewise, 13 of the top 20 countries are from the region. Table 3 shows the rankings for European countries only, with the first column showing the rank within the region, the second column showing the overall rank out of all 140 economies included in the Index this year, and the third column showing the score. As the table shows, Switzerland is ranked 1st out of all countries in the 2013 TTCI, a position it has held since the first edition of this *Report* in 2007. Germany, Austria, Spain, and the United Kingdom complete the top five, while France and Sweden are among the top 10 overall.

**Switzerland** continues to lead the rankings, performing well on almost all aspects of the Index. Switzerland's infrastructure, especially ground transport (3rd), is among the best in the world. The country also boasts top marks for its hotels and other tourism-specific facilities, with excellent staff thanks to the availability of qualified labor to work in the industry (ranked 2nd)—perhaps not surprising in a country that holds many of the world's best hotel management schools. Switzerland also attracts tourists because of its rich and well-managed natural resources. A large percentage of the country's land area is protected, environmental regulation is among the most stringent (3rd), and the T&T industry is considered to be developed in a sustainable way (7th). These good environmental conditions, combined with the high safety and security of the country (2nd), contribute to its solid T&T competitiveness. Switzerland is not only a strong leisure tourism destination but also an important business travel hub, with many international fairs and exhibitions held in the country each year, driving its showing on the cultural resources pillar (6th). Switzerland's strong performance in all these areas enables the country to somewhat make up for its lack of price competitiveness (139th), which, together with a fairly restrained international visa policy, does indeed limit the number of arrivals.

**Germany** ranks 2nd in Europe and out of all countries in the TTCI. Similar to Switzerland, its infrastructure is among the best in the world: it is ranked 6th for ground transport infrastructure and 7th for air transport infrastructure, facilitating connections both within the country and internationally. Germany also has abundant cultural resources (ranked 5th worldwide for its many World Heritage cultural sites) and is host to almost 600 international fairs and exhibition per year (2nd), while hotel prices are relatively competitive (55th). In addition,

Germany makes great efforts to develop in a sustainable way (4th), with the world's most stringent environmental regulations—which are also among the best-enforced—and the strong support of international environmental efforts, as demonstrated through its ratification of many international environmental treaties.

**Austria** ranks 3rd, improving by one position since 2011. Its strong performance is driven by factors such as tourism infrastructure, in which it ties for 1st place with Italy; a welcoming attitude toward visitors; a very safe and secure environment (7th); and, most importantly, its rich cultural resources. Austria hosts nine World Heritage cultural sites, has excellent creative industries, and attracts many travelers with several fairs and exhibitions organized every year. The country's tourism industry is also being developed in a sustainable way (10th), with some of the most stringent (4th) and well-enforced (7th) environmental regulations in the world, driving its overall positive performance on environmental sustainability (ranked 6th).

**Spain** is the country among the top 10 that sees the most improvement since 2011: moving up four places since the last assessment, it is now ranked 4th. Spain continues to lead in cultural resources, ranking 1st this year in this area because of its extremely numerous World Heritage sites (2nd) and its large number of international fairs and exhibitions (3rd), as well as its significant sports stadium capacity. Its tourism infrastructure is another strength, with its many hotel rooms, car rental facilities, and ATMs. Furthermore, its air transport infrastructure is highly developed and ranks among the top 10 worldwide. Spain has improved in a few areas since the last edition. In particular, starting a business has become less costly and onerous, according to the World Bank, and hotel prices have come down a bit. The government has also kept tourism high in its development agenda, making Spain a top 10 economy for prioritization of the industry. Spain has notably maintained its efforts on marketing activity and spending on the industry's development amid difficult economic circumstances.

**The United Kingdom** moves up by two more positions since the last edition of the *Report*, to reach 5th place this year. The country's T&T competitiveness is based on its excellent cultural resources (ranked 3rd), with many World Heritage cultural sites, a large number of international fairs, and strong creative industries (all ranked within the top 10). The country has probably benefitted from two important events in 2012: the Olympic Games and the Diamond Jubilee of Queen Elizabeth II. Although the outcome is not yet fully reflected in the data, the United Kingdom has leveraged the preparation of these events in terms of tourism campaigns, generating interest in visiting the country and reinforcing their already-solid ICT and air transport infrastructure (ranked 10th and 5th, respectively). The



Table 3: The Travel &amp; Tourism Competitiveness Index 2013: Europe

Country/Economy	SUBINDEXES								
	OVERALL INDEX			T&T regulatory framework		Business environment and infrastructure		T&T human, cultural, and natural resources	
	Regional rank	Overall rank	Score	Rank	Score	Rank	Score	Rank	Score
Switzerland	1	1	5.66	1	5.94	1	5.42	2	5.63
Germany	2	2	5.39	8	5.57	6	5.29	7	5.31
Austria	3	3	5.39	2	5.80	11	5.11	9	5.24
Spain	4	4	5.38	14	5.48	5	5.30	6	5.36
United Kingdom	5	5	5.38	17	5.44	10	5.13	3	5.57
France	6	7	5.31	9	5.56	7	5.18	11	5.20
Sweden	7	9	5.24	12	5.54	23	4.89	8	5.30
Netherlands	8	13	5.14	16	5.45	15	5.01	16	4.97
Iceland	9	16	5.10	3	5.77	13	5.06	36	4.47
Finland	10	17	5.10	5	5.74	22	4.89	24	4.65
Belgium	11	18	5.04	18	5.43	26	4.78	18	4.90
Ireland	12	19	5.01	7	5.68	19	4.96	40	4.41
Portugal	13	20	5.01	20	5.42	27	4.78	19	4.84
Denmark	14	21	4.98	25	5.31	16	4.98	26	4.64
Norway	15	22	4.95	11	5.55	28	4.77	33	4.53
Luxembourg	16	23	4.93	21	5.41	20	4.96	39	4.42
Malta	17	24	4.92	15	5.47	14	5.06	49	4.22
Italy	18	26	4.90	50	4.90	29	4.76	14	5.05
Cyprus	19	29	4.84	22	5.35	21	4.89	46	4.27
Estonia	20	30	4.82	10	5.55	30	4.72	51	4.19
Czech Republic	21	31	4.78	28	5.24	37	4.49	28	4.61
Greece	22	32	4.75	39	5.02	33	4.65	30	4.58
Croatia	23	35	4.59	42	4.99	39	4.43	42	4.37
Slovenia	24	36	4.58	33	5.12	35	4.52	52	4.11
Hungary	25	39	4.51	26	5.29	49	4.16	54	4.08
Montenegro	26	40	4.50	34	5.09	50	4.14	47	4.26
Poland	27	42	4.47	49	4.92	58	3.94	32	4.56
Turkey	28	46	4.44	64	4.62	52	4.08	27	4.63
Latvia	29	48	4.43	35	5.08	40	4.40	77	3.81
Lithuania	30	49	4.39	41	4.99	48	4.19	61	3.98
Bulgaria	31	50	4.38	58	4.79	45	4.24	53	4.10
Slovak Republic	32	54	4.32	43	4.96	60	3.92	55	4.06
Russian Federation	33	63	4.16	92	4.24	46	4.22	58	4.02
Georgia	34	66	4.10	30	5.18	80	3.46	91	3.67
Romania	35	68	4.04	66	4.61	68	3.67	73	3.85
Macedonia, FYR	36	75	3.98	57	4.79	74	3.58	100	3.58
Ukraine	37	76	3.98	60	4.73	71	3.62	99	3.59
Albania	38	77	3.97	63	4.65	90	3.31	63	3.96
Armenia	39	79	3.96	51	4.88	88	3.34	94	3.65
Serbia	40	89	3.78	74	4.50	81	3.40	109	3.45
Bosnia and Herzegovina	41	90	3.78	75	4.47	95	3.19	92	3.66
Moldova	42	102	3.60	65	4.61	97	3.16	133	3.04

generally supportive policy environment, ranked 8th, encourages the development of the sector, while the country relies on an excellent human resources base (ranked 6th). On a less positive note, the United Kingdom continues to receive one of the poorest assessments for price competitiveness (138th), in large part because it has the 2nd highest tax rate on tickets and airport charges worldwide.

**France** is ranked 7th overall in this edition, losing four positions since 2011. France continues to attract many tourists with its rich cultural heritage (ranked 4th for the number of World Heritage cultural sites and 8th for creative industries). The country also hosts many

international fairs and exhibitions (ranked 5th). France's ground transport infrastructure is still one of the best in the world (ranked 5th), with particularly good roads and railroads as well as good air transport infrastructure (ranked 8th). However, the overall policy rules and regulation framework is not sufficiently supportive of developing the sector, and the prioritization of the T&T sector declines this year (ranked 35th overall). Additionally, the assessment has weakened somewhat in terms of the quality and availability of qualified labor in the country.

**Sweden** is ranked 9th this year. The country tops the rankings of the sustainability pillar, is 2nd in terms



of cultural resources, and comes in 3rd for its ICT infrastructure. Additionally, it offers a safe and secure environment (8th) and benefits from strong human resources (12th). However, the prioritization of Travel & Tourism has dropped to 74th place, perhaps in the face of recent pressing economic concerns related to the global economic crisis, and the country has become even more comparatively costly (it ranks 129th for its lack of prices competitiveness this year, a slight decline since last the last edition).

**Italy** moves up one spot this year to place 26th overall and 18th in Europe. As well as its cultural richness—with many World Heritage Sites, international fairs and exhibitions, and rich creative industries—Italy's strengths lie in its excellent tourism infrastructure (tying with Austria for 1st place) and its relatively good air transport infrastructure (24th). However, it faces a number of challenges that bring its overall rating down. These include policy rules and regulations that are still not sufficiently supportive of the development of the sector (100th) and a lack of price competitiveness (134th).

**Greece** is ranked 32nd, down another three positions since the last assessment. The country's rich cultural resources (ranked 25th) and excellent tourism infrastructure (3rd) are still important strengths. Additionally, Greece has very good health and hygiene conditions (ranked 13th overall) and good air transport infrastructure (20th). Further, there is a strong national affinity for tourism compared with many other European countries, including a generally open and positive attitude toward tourists. The decline in the rankings can be traced to a further worsening of the policy environment and a lower perceived prioritization of Travel & Tourism within the country, probably because of dwindling resources available for the particular industry amid general economic and financial difficulties.

**Croatia**, a country well known for its tourism industry, ranks 35th overall, trailing slightly behind countries such as Malaysia and slightly above Turkey. Croatia's performance has remained stable over the last several editions of the *Report*. It is endowed with a remarkable 18 cultural World Heritage sites and 1 natural World Heritage site, and is ranked 29th in terms of its overall affinity for Travel & Tourism. In addition, the country's tourism-specific infrastructure is ranked 5th worldwide. Also, Croatia—highly dependent on the quality of its natural environment for leisure tourism—makes efforts toward sustainability (44th) and has good health and hygiene standards (31st). On the other hand, in order to improve the sector's competitiveness further, a goal will be to upgrade its ground transport infrastructure, particularly its railroads and ports, and its air transport infrastructure. More efforts should also be devoted to ensuring that the country's policy rules and regulations are supportive of developing the sector

(96th) with improvements in areas such as FDI, property rights protection, and red tape. Besides improving the tourism industry, such advances would favor general development in the country.

**Montenegro** slides four places in the rankings after having improved significantly in recent years. At 40th place, it continues to demonstrate a strong performance, placing just behind Croatia and Hungary in the region. Policy rules and regulations support the development of the T&T sector (22nd). Montenegro also retains a strong affinity for Travel & Tourism (ranked 7th)—perhaps not surprising given the importance of the sector for the country's economy. Additionally, tourism infrastructure is well developed (ranked 19th), while ground transport has been improving, although—at 92nd—this is still an area requiring further investment. Human resources (51st) could be better leveraged: both the quality of education and the availability of qualified labor are less well assessed than in the past edition. These areas are essential for the future development of the industry and the economy more generally as the country develops.

**Turkey** climbs four positions this year to reach 46th place. The country's main strength continues to lie in its rich cultural resources (19th), with 20 World Heritage cultural sites, several international fairs and exhibitions, and strong creative industries. In addition, Turkey gains significantly in a number of areas and has seen a significant increase in tourist arrivals over the last two years. The policy rules and regulations governing the sector are supportive and have continued to progress since the 2011 *T&T Report*. Turkey has also improved its air transport infrastructure (29th) and its tourism infrastructure (45th). However, some areas still hold back the overall T&T competitiveness performance of the country: although improving, safety and security issues (79th) remain worrisome, ground transport infrastructure is inadequate (especially railroads and ports), and ICT infrastructure remains unsatisfactory (71st), especially for a rapidly growing tourism destination. In addition, more efforts must be made toward environmental sustainability (ranked 95th), an area that will be of increasing concern going forward.

**Russia** is ranked 63rd overall, losing four positions since the last *Report*. The country receives a good assessment for its cultural resources (39th), the result particularly of its many World Heritage sites and its well-developed air transport infrastructure (33rd). However, ground transport infrastructure (93rd) gets lower marks. Safety and security issues are also of serious concern (113th), with a high level of crime and violence, a lack of trust in the police to provide protection from crime, and many deaths caused by road traffic accidents, although this area has seen some improvement since the last assessment. Most strikingly, Russia is assessed as having a very non-conducive policy environment (123rd), caused, for example, by extremely

rare foreign ownership, property rights that are not well protected, and visa requirements for visitors from many countries; furthermore, it ranks a low 111th for the prioritization of its Travel & Tourism industry. Additionally, notwithstanding the country's important endowment of natural resources (37th, declining by 10 positions since the last assessment), insufficient attention is paid to environmental sustainability (ranked 134th).

**Armenia** is ranked 79th in this edition of the *Report*, up an impressive 11 positions since the last assessment. Improvements have taken place across many areas measured by the Index, with the most marked being registered in the areas of policy rules and regulations, human resources, and safety and security (where the country ranks 46th, 44th and 37th respectively). In particular, red tape (33rd) and the cost to start a business (38th) have been reduced significantly, and visa requirements have become more open (35th). The country also benefits from a safe and secure environment. ICT infrastructure (73rd) has improved notably, especially in terms of Internet availability and usage. Infrastructure has also improved, benefitting from significant investment in recent years. Notwithstanding the improvements, air transport, ground transport, and tourism infrastructures remain relatively underdeveloped, ranking 85th, 94th, and 80th, respectively.

As in past years, at the bottom of the European rankings are a number of Balkan countries (**Serbia, Bosnia and Herzegovina, and Moldova**). In line with their less-advanced development, these countries will require significant investments in upgrading the infrastructure needed to support healthy and growing T&T sectors.

## The Americas

Table 4 shows the regional rankings for the countries in the Americas. As this table shows, **the United States** is the highest-ranked country in the Americas and 6th out of all countries, with stable performance since the last assessment. Overall, the country receives high marks for its business environment and infrastructure. In particular, the United States has excellent air transport infrastructure (ranked 2nd) and high-quality tourism infrastructure, as well as a strong focus on customer satisfaction. Its cultural resources and natural resources (ranked 5th and 3rd, respectively), with many World Heritage cultural and natural sites, drive its high position in the rankings, together with several fairs and exhibitions (1st) and strong creative industries (2nd). On a less positive note, the country's natural endowments are not being sufficiently protected (ranked 112th for environmental sustainability). Also, compared with other top-ranked economies, the quality of ground transport could be improved more (27th) and the perception of safety and security leaves room for improvement (57th).

**Canada** moves up one place to 8th overall. The country has several strengths, including its rich natural resources (10th) with numerous World Heritage sites (ranked 5th), excellent air transport infrastructure, highly qualified human resources (5th), and a strong policy environment (10th). Its cultural resources are also a strong point, with many international fairs and exhibitions in the country. Canada has lost some ground in terms of price competitiveness and environmental sustainability, where, although it still ranks fairly high (41st), it registers a decline in the perception of the enforcement of environmental regulations and continues to suffer from high CO<sub>2</sub> per capita emissions.

**Barbados** ranks 3rd in the region and 27th overall, up one place since the last assessment. Barbados comes in 2nd overall for the country's affinity for Travel & Tourism, with a positive attitude toward tourists and toward the value of tourism in the country, although it does receive a middling score for the degree of customer orientation (64th). The importance of the T&T sector for Barbados is reflected in the high prioritization placed on Travel & Tourism (8th), with significant emphasis put on the sector's development by the government and high spending on the sector, ensuring effective destination-marketing campaigns and collecting relevant sector data on a timely basis. However, although there have been some marginal improvements in some elements of its environmental sustainability, additional efforts to protect the natural environment would reinforce the country's strong T&T competitiveness.

**Panama** witnesses one of the most marked improvements in this year's TTCL, moving up to 37th position overall and 4th in the region. The country's most important competitive advantage is its rich endowment of natural resources, with its diverse fauna, significant protected land areas, and a number of World Heritage sites. The improvement in this year's rankings can be traced mainly to an improvement in the country's infrastructure. Tourism infrastructure has been developed (now ranked 42nd), most notably with more available hotel rooms. The quality of ground transport has also improved across almost all modes, with port infrastructure now ranked 4th and railroads ranked 32nd. Air transport improves as well and is now ranked 16th. The expansion of stadium capacity and creative industries exports is also notable. On the other hand, areas requiring further improvement include safety and security (70th), the human resources base (79th), and health and hygiene standards (86th).

**Mexico** is stable this year at 44th position (and 5th in the region). Mexico receives impressive marks for its natural resources (ranked 8th), an area that shows an improvement since the last assessment, with many World Heritage natural sites and rich fauna. The country's cultural resources are also among the best in the world (21st), with 34 World Heritage cultural

Table 4: The Travel &amp; Tourism Competitiveness Index 2013: The Americas

Country/Economy	OVERALL INDEX			T&T regulatory framework		Business environment and infrastructure		T&T human, cultural, and natural resources	
	Regional rank	Overall rank	Score	Rank	Score	Rank	Score	Rank	Score
United States	1	6	5.32	44	4.95	2	5.36	1	5.65
Canada	2	8	5.28	27	5.27	8	5.17	5	5.39
Barbados	3	27	4.88	13	5.50	18	4.96	50	4.20
Panama	4	37	4.54	54	4.83	36	4.52	45	4.29
Mexico	5	44	4.46	83	4.43	61	3.92	15	5.02
Costa Rica	6	47	4.44	52	4.88	56	3.98	38	4.45
Brazil	7	51	4.37	82	4.43	76	3.57	12	5.10
Puerto Rico	8	52	4.36	40	4.99	43	4.33	81	3.75
Chile	9	56	4.29	53	4.87	53	4.07	65	3.94
Uruguay	10	59	4.23	31	5.18	78	3.53	62	3.97
Argentina	11	61	4.17	69	4.54	72	3.61	41	4.38
Jamaica	12	67	4.08	59	4.76	64	3.76	87	3.72
Peru	13	73	4.00	96	4.17	85	3.36	37	4.47
Ecuador	14	81	3.93	85	4.37	83	3.38	56	4.05
Trinidad and Tobago	15	83	3.93	104	4.07	54	4.07	95	3.64
Colombia	16	84	3.90	101	4.11	103	3.09	34	4.51
Dominican Republic	17	86	3.88	67	4.60	75	3.58	108	3.45
Honduras	18	93	3.72	97	4.17	92	3.28	89	3.69
Nicaragua	19	95	3.67	98	4.15	101	3.11	82	3.74
Guatemala	20	97	3.65	109	3.93	98	3.15	69	3.88
Suriname	21	100	3.63	106	4.05	100	3.11	86	3.72
Guyana	22	103	3.60	80	4.44	111	2.88	106	3.47
El Salvador	23	104	3.59	99	4.14	82	3.39	125	3.24
Bolivia	24	110	3.46	125	3.55	102	3.09	85	3.73
Venezuela	25	113	3.41	119	3.67	99	3.12	110	3.45
Paraguay	26	115	3.39	103	4.09	115	2.80	120	3.29
Haiti	27	140	2.59	138	2.93	136	2.39	140	2.44

sites, several international fairs and exhibitions, and strong creative industries. These inherent strengths are reinforced by the overall prioritization of the sector in the country (34th) and effective marketing and branding campaigns. Some areas have improved, yet continue to require attention—for example, ground transport infrastructure is being developed but still ranks relatively low (69th), and more efforts are required to ensure that the sector is being developed in a sustainable way (105th). Finally, despite a marginal improvement since last year, safety and security remains the main source of concern for the T&T sector, where Mexico still ranks a low 121st.

**Costa Rica** is ranked 6th in the region and 47th overall. The country gets excellent marks for its natural resources (ranked 7th), with several World Heritage sites, a high percentage of nationally protected areas, and very diverse fauna. Given the importance of the natural environment for the country's tourism industry, it is notable that it ranks a high 26th overall for environmental sustainability, an area where it has continued to improve slightly over the past few years. However, health and hygiene remains a concern (78th). Further, although its tourism infrastructure is relatively well developed (33rd), with a strong presence of major car rental companies and abundant hotel rooms, ground transport

infrastructure requires significant upgrading (100th), particularly roads and ports, making travel in the country somewhat difficult.

**Brazil** is ranked 7th in the Americas and 51st overall, up one position since 2011. The country is ranked 1st out of all countries for its natural resources and 23rd for its cultural resources, with many World Heritage sites, a good proportion of protected land area, and the richest fauna in the world. This is buttressed by a focus on environmental sustainability (ranked 30th), an area that has been improving over recent years, although the protection of the country's diverse fauna requires additional efforts. The safety and security environment and health and hygiene conditions have also improved slightly since the last assessment. On the other hand, the ground transport network remains underdeveloped (129th), with the quality of roads, ports, and railroads requiring improvement to keep pace with the economic development of the country. Preparations for two major sports events in the next five years (the FIFA World Cup in 2014 and the Olympic Games in 2016) provide opportunities to bridge the infrastructure gap. Brazil also continues to suffer from a lack of price competitiveness (126th), with high and increasing ticket taxes and airport charges, as well as high and rising prices more generally. Further, the overall policy environment is not

particularly conducive to the development of the sector (ranked 119th), with discouraging rules on FDI, much time required for starting a business, and somewhat restrictive commitments to opening up tourism services under GATS commitments.

**Puerto Rico** is ranked 8th in the region and 52nd overall, down seven places to reach a position similar to the one it held in the 2009 edition of the *Report*. Puerto Rico continues to demonstrate a number of strengths, including a policy environment that is conducive to the development of the sector (19th), solid efforts to ensure environmental sustainability (16th), and reasonably high prioritization of T&T in the government agenda (41st). The drop in rankings is attributable mainly to a somewhat poorer relative assessment of the quality of transport and tourism infrastructure. Improvements could also be made in the areas of education and training (44th) and facilitating the hiring of foreign labor (107th).

**Chile** ranks 9th in the region and 56th overall, maintaining a stable performance since the last assessment. It has notable cultural resources, with six World Heritage cultural sites and several international fairs and exhibitions. In addition, policy rules and regulations are conducive to the development of the T&T sector (12th), with few foreign ownership restrictions, a liberal visa regime, and open bilateral Air Service Agreements, although the time and cost for starting new businesses remain relatively high. The country also benefits from good safety and security by regional standards (31st). Additionally, tourism infrastructure has improved noticeably and now ranks 49th. However, Chile's T&T competitiveness would be strengthened by upgrading its transport infrastructure and thus raising the quality of tourism infrastructure further, as well as by focusing more on preserving the environment to develop the industry in a more environmentally sustainable way.

**Peru** is ranked 13th in the region, placing 73rd overall. Peru's natural and cultural resources remain important assets for the tourism industry. The country has one of the richest fauna in the world (3rd) and hosts several natural and cultural World Heritage sites. Peru has seen a continuous growth in tourist arrivals and international flights, even during the global recession. The effectiveness of marketing and branding to promote the T&T sector shows improvement, and government spending on the industry has increased slightly. However, in order to raise its T&T competitiveness further, safety and security must be improved (118th) and ground transport infrastructure must be upgraded (121st). Additionally, the country has lost some price competitiveness because of higher general and tourism-specific taxation, most notably the high ticket taxes and airport charges (where the country ranks 135th). A more in-depth analysis of the performance of the T&T competitiveness of Peru will be conducted in a dedicated

publication to be issued in April 2013, on occasion of the World Economic Forum on Latin America 2013.

**Colombia** is ranked 84th, 16th in the region. The country's main strengths continue to be its rich cultural and natural resources, where it ranks 37th and 16th, respectively. However, the country ranks a low 97th on the environmental sustainability pillar, losing several places since the last assessment and raising some concerns about its ability to continue to depend on its natural resources going forward. On the positive side, Colombia's business environment shows some progress since the last edition, with a notable reduction in the cost and time required to start a business. However, it continues to demonstrate a number of areas for improvement. Infrastructure is in need of upgrading, especially ground transport (ranked 131st). In addition, safety and security (115th), although improved, still needs to be reinforced in order to overcome some of the perceptions of insecurity by international travelers. Finally, in terms of price competitiveness, the increasing cost of hotels, and rising prices more generally, are an additional concern.

**Argentina** remains 11th in the region and places 61st overall, down one position since the last *Report*. Argentina has strong natural resources (20th), with four World Heritage sites and very diverse fauna. The country also benefits from a relatively high airport density, abundant seat kilometers, and a number of operating airlines, although the quality of air transport continues to be highlighted as a problem area (ranked 113rd). There is a mixed picture in the area of policy rules and regulations: on one hand, there have been some improvements such as greater openness in bilateral Air Service Agreements (25th). On the other hand, there are still concerns about property rights (132nd), and rules on FDI do not encourage investment (138th). Further, the quality of its ground transport remains underdeveloped (120th) and environmental regulation is neither sufficiently stringent (ranked 102th) nor well enforced (ranked 129th), of particular concern given the importance of natural resources for the country's tourism industry.

**Venezuela**, despite being ranked a high 24th for its natural resources (with much protected land area and diverse fauna), is ranked third from last in the region and 113th overall. Among the most important concerns are a lack of safety and security (ranked 131st), the low prioritization of the tourism industry (120th), and a policy environment that is not conducive to the development of the sector (137th). Property rights are not well protected in the country, and FDI is not encouraged (ranked 140th, last out of all countries, for both indicators). Further, Venezuela receives the poorest assessment of all countries for its affinity for Travel & Tourism (140th). In addition, infrastructure is in need of significant upgrading, particularly ground transport infrastructure (ranked 139th).

## Asia Pacific

Table 5 displays the regional rankings and data for the Asia Pacific region. As the table shows, **Singapore** is the top-ranked economy in the region at 10th position overall, the same position it has held for the past three editions. Singapore benefits from excellent transport infrastructure, with ground transport infrastructure and air transport infrastructure ranked 2nd and 14th, respectively. Singapore ranks 2nd for the high quality of its available human resources. And with its famously well-functioning public institutions, it is perhaps not surprising that Singapore ranks 1st out of all economies for its policy environment, with rules and regulations that are extremely conducive to the development of its T&T industries (policies facilitating foreign ownership and FDI, well-protected property rights, and few visa restrictions). Further, Singapore is among the safest economies of all assessed with regard to safety and security, and receives strong assessments for other types of infrastructure. One area of concern is its lack of price competitiveness, which has eroded, as seen in increasing hotel prices and taxation.

Singapore is followed in the regional rankings by **Australia**, which improves by two places and is now at 11th position overall. Australia's T&T competitiveness continues to be characterized by a number of clear strengths, including its rich natural resources and the highest number of World Heritage natural sites in the world, benefiting from diverse fauna and a comparatively pristine natural environment. Given the importance of the environment for much of its leisure tourism, it is notable that the stringency and enforcement of its environmental regulations are well assessed. And 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 4th) as well as good general tourism infrastructure (ranked 20th). Australia also sees some improvements in the policy rules and regulations affecting the sector, especially its increased openness in bilateral Air Service Agreements. In terms of visa requirements, Australia has one of the most advanced visa policies in the world (especially with respect to the electronic visa process) at a time when a number of other countries are moving in the opposite direction.

**New Zealand** ranks 3rd in the region and 12th overall, an improvement of seven positions, one of the most significant in the region. The country continues to benefit from its rich natural resources, with a number of World Heritage natural sites (ranked 18th) and a pristine natural environment (ranked 3rd), protected by strong and well-enforced environmental legislation. The country's policy rules and regulations are highly conducive to the development of the sector (ranked

2nd), with very transparent policymaking and among the least time and lowest cost required to start a business in the world. The country also benefits from high-quality human resources (ranked 13th) and a very safe and secure environment overall (9th). Although New Zealand's ground transport network remains somewhat underdeveloped given its advanced stage of development, its air transport infrastructure gets excellent marks (ranked 12th) and its ICT infrastructure is quite good by international standards. The most relevant improvement in New Zealand's performance in this edition is registered in its tourism infrastructure, driven especially by a rise in the number of available hotel rooms.

**Japan** is ranked 4th regionally and 14th out of all the economies in the TTCI, up eight places since the last assessment. This achievement is especially impressive against the backdrop of the 2011 tsunami and related nuclear disaster. Japan's T&T sector resilience can be ascribed to its rich cultural resources (ranked 11th), with its 32 World Heritage cultural sites, the many international fairs and exhibitions hosted by the country, and its rich creative industries. Its ground transport infrastructure is among the best in the world (ranked 7th), especially its railroads, and Japan continues to lead in the area of education and training (ranked 13th). Moreover, it has continued to develop its already strong ICT infrastructure and now ranks 7th in this area. In addition, Japan's extremely customer oriented culture (1st) is an important strength for the T&T industry. On the other hand, the country continues to be an expensive destination, ranking 130th in the price competitiveness pillar.

**Hong Kong SAR** is ranked 15th overall. Its transport infrastructure is among the most developed in the world, with the best ground transport infrastructure and air transport infrastructure that ranks 6th. Further, the economy's ICT infrastructure ranks 2nd worldwide, demonstrating an important support for an industry that depends so much on ICTs. Additionally, Hong Kong benefits from strong safety and security (3rd) as well as a conducive business environment, coming in 3rd in the policy rules and regulations pillar. It also receives relatively good marks for cultural resources, with many international fairs and exhibitions and strong creative industries. However, Hong Kong trails other advanced economies in the region for its lack of emphasis on environmental sustainability, where it ranks a low 118th.

**Korea, Rep.** is ranked 25th, just ahead of Taiwan and Malaysia in the regional rankings and improving by seven places. Korea's strengths lie in its excellent ground transport and ICT infrastructure (ranked 16th and 1st, respectively) and its rich cultural resources (ranked 10th). Its rise in the overall rankings is driven by improvements in almost all the pillars, with a measurable increase in the prioritization and affinity for Travel & Tourism, thanks



Table 5: The Travel &amp; Tourism Competitiveness Index 2013: Asia Pacific

Country/Economy	OVERALL INDEX			SUBINDEXES					
	Regional rank	Overall rank	Score	T&T regulatory framework		Business environment and infrastructure		T&T human, cultural, and natural resources	
				Rank	Score	Rank	Score	Rank	Score
Singapore	1	10	5.23	6	5.74	4	5.31	25	4.64
Australia	2	11	5.17	23	5.32	25	4.81	4	5.39
New Zealand	3	12	5.17	4	5.75	12	5.06	22	4.69
Japan	4	14	5.13	24	5.31	24	4.86	10	5.22
Hong Kong SAR	5	15	5.11	19	5.43	3	5.32	29	4.59
Korea, Rep.	6	25	4.91	38	5.02	17	4.98	20	4.74
Taiwan, China	7	33	4.71	29	5.19	34	4.63	44	4.29
Malaysia	8	34	4.70	55	4.82	41	4.36	17	4.93
Thailand	9	43	4.47	76	4.47	44	4.25	23	4.68
China	10	45	4.45	71	4.50	63	3.77	13	5.09
India	11	65	4.11	110	3.92	67	3.69	21	4.72
Indonesia	12	70	4.03	95	4.18	84	3.36	31	4.56
Brunei Darussalam	13	72	4.01	94	4.18	57	3.94	67	3.91
Sri Lanka	14	74	3.99	61	4.68	86	3.35	66	3.93
Azerbaijan	15	78	3.97	46	4.94	87	3.34	96	3.63
Vietnam	16	80	3.95	88	4.30	94	3.26	43	4.30
Philippines	17	82	3.93	70	4.51	89	3.33	64	3.95
Kazakhstan	18	88	3.82	62	4.66	79	3.48	119	3.30
Mongolia	19	99	3.63	91	4.25	107	2.96	90	3.69
Cambodia	20	106	3.56	105	4.06	112	2.86	78	3.77
Kyrgyz Republic	21	111	3.45	93	4.23	131	2.61	103	3.51
Nepal	22	112	3.42	100	4.14	128	2.64	105	3.48
Tajikistan	23	114	3.41	90	4.28	123	2.69	122	3.26
Pakistan	24	122	3.25	131	3.38	104	2.99	116	3.38
Bangladesh	25	123	3.24	124	3.56	109	2.91	124	3.24

to increased marketing and branding efforts, and a high degree of customer orientation (9th). On a less positive note, Korea remains a relative costly destination (ranked 96th for price competitiveness) and, despite much discussion in public discourse, the tourism sector is not being developed in a sufficiently sustainable way (69th), although there are improvements since the last assessment.

**Malaysia** is ranked 8th regionally and 34th overall, up one position since the 2011 *Report*. Malaysia benefits from its rich natural resources (ranked 18th) and its cultural resources (ranked 31st). The country also benefits from excellent price competitiveness (ranked 5th), with comparatively low fuel prices, low ticket taxes and airport charges, competitive hotel prices, and a favorable tax regime. Malaysia's policy environment is assessed as very conducive to the development of the sector (ranked 9th), an area that has improved since the last assessment, and the country is characterized by a strong affinity for Travel & Tourism more generally (ranked 16th). However, health and hygiene indicators trail those of many other countries in the region, with, in particular, a low physician density and few hospital beds available. Further, environmental sustainability remains an area for improvement, with high emission levels and several threatened species, although business leaders feel that efforts are being made in this area.

**Thailand** is ranked 9th in the region and 43rd overall. The country declines by only two places since the last edition, demonstrating some resilience to the natural disasters and political unrest with which the country has been grappling. Thailand is endowed with rich natural resources and a strong affinity for Travel & Tourism (ranked 23rd and 18th, respectively), with a very friendly attitude of the population toward tourists (ranked 13th). This is buttressed by the government's strong prioritization of the sector, with good destination-marketing campaigns (11th) and relative price competitiveness (25th). However, some weaknesses remain: despite the prioritization of the sector by the government, some aspects of the regulatory environment—such as the protection of property rights and the long time required for starting a business—are not particularly conducive to developing the sector (ranked 77th). In addition, given the importance of the natural environment for the country's tourism, environmental sustainability should be a greater priority (ranked 99th on this indicator).

**China** is ranked 10th regionally, losing six places and falling to 45th overall this year. China continues to build on some clear strengths: it comes in 5th for its natural resources, with many World Heritage natural sites and fauna that are among the richest in the world. It places 15th for its cultural resources, with

several World Heritage cultural sites, many international fairs and exhibitions, and creative industries that are unsurpassed. Moreover, the country continues to develop its infrastructure, with improvements in air transport (35th) and ground transport (51st). However, some weaknesses pull the country's ranking down. China's policy environment is not highly conducive to the T&T sector's development (ranked 86th). Furthermore, there are increasing concerns related to the sustainable development of the sector (109th). China's tourism infrastructure remains underdeveloped (ranked 101th), with few international-quality standard hotel rooms available and few ATMs, and the country receives a poor assessment for its general affinity for Travel & Tourism, where it ranks 129th. Finally, although the country continues to benefit from relative price competitiveness (ranked 37th), this advantage has started to weaken under the weight of increasing inflation in several areas, as demonstrated by higher hotel prices and weakening purchasing power.

**India** is ranked 11th in the region and 65th overall, gaining three places since the last edition. As with China, India is well assessed for its natural resources (ranked 9th) and cultural resources (24th), with many natural and cultural World Heritage sites, rich fauna, many fairs and exhibitions, and strong creative industries. India also has quite good air transport (ranked 39th), particularly given the country's stage of development, and reasonable ground transport infrastructure (ranked 42nd), although the quality of roads (85th) and of ports (79th) require further improvement. In addition, India remains a relatively price competitive destination (20th), even in the regional context. However, some aspects of its tourism infrastructure remain somewhat underdeveloped (ranked 95th), with very few hotel rooms per capita by international comparison and low ATM penetration. ICT infrastructure also remains somewhat underdeveloped and underexploited (111th). Another area of concern is the policy environment, which is ranked 125th because of the long time and high cost required to start a business, a restrictive visa policy (132nd), and low level of commitment in GATS agreements for tourism services (114th). Other areas requiring attention are health and hygiene standards (109th) and the country's human resources base (96th).

**Indonesia** is ranked 12th in the region, right behind India the regional rankings and 70th overall, up four places since the last edition. In terms of strengths, Indonesia places 6th for its excellent natural resources, with several World Heritage natural sites and the richness of its fauna as measured by the known species in the country. Indonesia also has rich cultural resources (ranked 38th), with 10 World Heritage cultural sites, a number of international fairs and exhibitions held in the country, and strong creative industries. Further, the country is ranked 9th overall on price competitiveness in

the T&T industry because of its competitive hotel prices (ranked 21st), low ticket taxes and airport charges, and favorable fuel prices. In addition, it is ranked 19th for its national prioritization of Travel & Tourism. However, these strengths are held back by underdeveloped infrastructure in the country, especially ground transport (87th), tourism infrastructure (113th), and ICT infrastructure (87th); together these represent significant investment opportunities in the country. There are also some concerns related to safety and security, particularly the business costs of crime and potential terrorism. In addition, Indonesia is not ensuring the environmentally sustainable development of the tourism sector (ranked 125th), an area of particular concern given the sector's dependence on the quality of the natural environment.

**Vietnam** remains stable at 80th position overall. It benefits from its rich cultural resources (ranked 28th), with several World Heritage cultural sites, several international fairs and exhibitions, and strong creative industries. Another attraction is Vietnam's natural resources; the country is ranked 25th for its World Heritage natural sites, and it has very diverse fauna. These attributes are reinforced by its price competitiveness (18th). In order to strengthen its T&T competitiveness, Vietnam must further develop its transport infrastructure, especially its ground transport (98th) and tourism infrastructure (112th), while ensuring that the sector is developed in an environmentally sustainable way (128th). Higher prioritization of the sector (now ranked a low 110th) could help to unlock the investment required for building the necessary infrastructure.

**The Philippines** is the most improved country in the region, ranking 16th regionally and 82nd overall, up 12 places since the last edition. Among the country's comparative strengths are its natural resources (44th), its price competitiveness (24th), and a very strong—and improving—prioritization of the Travel & Tourism industry (this indicator ranks 15th, as government spending on the sector as a percentage of GDP is now 1st in the world, and tourism marketing and branding campaigns are seen to be increasingly effective). In addition, the country has been ensuring that several aspects of its policy rules and regulations regime are conducive to the development of the T&T sector. Among these are better protection of property rights, more openness toward foreign investments, and few visa requirements for foreign visitors (ranked 7th). However, other areas—such as the difficulty of starting a business in the country, in both cost and length of the process (ranked 94th and 117th, respectively)—remain a challenge. Moreover, safety and security concerns (ranked 103rd); inadequate health and hygiene (94th); and underdeveloped ground transport, tourism, and ICT infrastructure are all holding back the potential of the economy's T&T competitiveness.



Table 6: The Travel &amp; Tourism Competitiveness Index 2013: The Middle East and North Africa

Country/Economy	SUBINDEXES								
	OVERALL INDEX			T&T regulatory framework		Business environment and infrastructure		T&T human, cultural, and natural resources	
	Regional rank	Overall rank	Score	Rank	Score	Rank	Score	Rank	Score
United Arab Emirates	1	28	4.86	45	4.95	9	5.14	35	4.51
Qatar	2	41	4.49	48	4.93	31	4.70	75	3.85
Israel	3	53	4.34	36	5.07	51	4.08	71	3.86
Bahrain	4	55	4.30	77	4.46	32	4.69	83	3.74
Oman	5	57	4.29	56	4.81	47	4.20	76	3.84
Jordan	6	60	4.18	37	5.05	69	3.63	72	3.86
Saudi Arabia	7	62	4.17	87	4.32	38	4.43	80	3.76
Lebanon	8	69	4.04	73	4.50	65	3.74	70	3.87
Morocco	9	71	4.03	68	4.59	73	3.60	68	3.89
Egypt	10	85	3.88	86	4.35	77	3.56	84	3.74
Iran, Islamic Rep.	11	98	3.64	112	3.90	96	3.18	74	3.85
Kuwait	12	101	3.61	114	3.81	62	3.89	131	3.14
Algeria	13	132	3.07	134	3.30	126	2.66	123	3.25
Yemen	14	133	2.96	140	2.82	110	2.89	128	3.18
Mauritania	15	134	2.91	137	3.07	133	2.60	132	3.07

### The Middle East and North Africa

Table 6 shows the regional rankings for the Middle East and North Africa region. As the table shows, the **United Arab Emirates (UAE)** continues to lead the region at 28th overall, up two places since the last assessment. Although the UAE is not endowed with rich natural resources, it has built a cultural resource base, attracting both leisure and business travelers, with several and growing international fairs and exhibitions and increasingly diverse creative industries. In addition, the country is characterized by a strong affinity for Travel & Tourism (24th). Perhaps the most important competitive advantage of UAE T&T competitiveness relates to its world-class international hubs for global air travel. Further, the country has carried out effective marketing and branding campaigns (1st) and has embraced policy rules and regulations that are conducive to the development of the sector (13th). In particular, the country is open to foreign investments (14th) and has a liberal visa regime (33rd). Environmental sustainability, although improving somewhat compared with past years, continues to be an area of some concern (ranked 91st). Hotel prices are also somewhat high by international standards (101st).

**Qatar** is ranked 2nd in the region and 41st overall, up one place since the last assessment. Qatar benefits from a safe and secure environment (ranked 21st), good ICT and tourism infrastructures (32nd and 37th, respectively), and excellent air transport infrastructure (23rd), in line with its role as an air transportation hub. The ease of hiring foreign labor (4th), increasing enrollment rates, and the quality of its education drive the ability of the country to find high-quality human resources (ranked 7th) inside and outside the country. Qatar also has a high degree of customer orientation (5th). In order to further enhance the country's T&T

competitiveness, Qatar should continue to improve its focus on environmental sustainability (59th) and ensure that it does not lose sight of the importance of the sector for its development—at a rank of 80 in this edition, the prioritization of the sector is somewhat lower than in past years.

**Israel** is ranked 3rd in the region, dropping seven places to 53rd overall. Israel benefits from its cultural attributes, including a number of World Heritage cultural sites. The country's human resources base is also well evaluated (31st), providing healthy and well-trained people to work in the T&T sector. Further, its ICT infrastructure is quite well developed (27th), while its health and hygiene gets a good mark (26th), especially in a regional context. On a less positive note, some aspects of safety and security continue to erode at the country's T&T competitiveness: these are primarily related to concerns about terrorism (Israel ranks 124th on this indicator, somewhat lower than in the last edition). However, the decline in rank since the last assessment can also be attributed to diminished price competitiveness (ranked 133rd), the result of increasing fuel prices, hotel prices, ticket taxes, and airport charges and the perception that general taxation has become more distortionary.

**Bahrain** is ranked 4th in the region and 55th overall, down 15 positions since the last assessment. The country maintains a number of clear strengths: good transport infrastructure, particularly ground transport infrastructure (ranked 11th); high-quality human resources in the country (26th); and strong price competitiveness (7th). However, Bahrain is seeing a weakening in the assessment of its tourism infrastructure (66th), while health and hygiene standards (89th) and ICT infrastructure (47th) struggle to keep up with rapid population growth. Also its limited natural resources

(129th) and environmental sustainability (103rd) do not help the country to attract tourists.

**Morocco** is ranked 9th in the regional rankings and 71st overall, improving by seven places since the last edition of the *Report*. Morocco's tourism sector has rebounded after the initial instability in the region that followed the Arab Spring. The country has improved in almost all areas of the Index, receiving good evaluations for aspects of its cultural resources, and is notably ranked 22nd for its many World Heritage cultural sites. In addition, Morocco is prioritizing the development of the sector (ranked 26th) and is characterized by a strong affinity for Travel & Tourism (22nd). Moreover, the government is seen to be making efforts to develop the T&T sector in a sustainable way. In order to improve the industry's competitiveness further, it would be necessary to progress on some of its long-standing shortcomings, such as health and hygiene (104th) and education and training (96th), as well as making additional improvements to the transport and tourism infrastructure. Safety and security also remain an area of concern.

**Lebanon** ranks 8th in the region and 69th overall. The country has a number of cultural attributes, including five World Heritage cultural sites and some creative industries. Perhaps more importantly, Lebanon is ranked 1st out of all countries for its affinity for Travel & Tourism, with tourism accounting for a significant amount of economic activity, a very positive attitude toward foreign travelers, and an appreciation of the value of the country's attributes for tourism. Indeed, tourism infrastructure is well developed in the country (ranked 27th). On the other hand, in order to improve Lebanon's T&T competitiveness, ground transport infrastructure should be further developed (this variable now ranks 110th) and safety and security issues (116th) must be addressed, especially with respect to the business costs of terrorism (131st). The policy rules and regulations framework should also be strengthened in order to better support the sector's development (115th); for example, the cost to start a business is still very high (123rd) and the rules on FDI do not encourage investment (91st).

**Egypt** is ranked 10th regionally, dropping 10 positions in the global assessment to reach 85th overall, probably the result of the continuing unrest in the country. Most notably, the evaluation of the safety and security environment has dropped to the lowest position of all countries covered in the *Report* (140th). Further, rules and regulations are seen as less conducive to the development of the sector, with a middling rank of 76. Concerns also remain about the state of ground transport infrastructure (96th position), tourism infrastructure (90th), and ICT infrastructure (80th). A focus on improving the human resources base, ranked 105th (a somewhat poorer assessment than in the last *Report*) would also improve the country's overall T&T competitiveness. On a positive note, the Index reminds

us of the several strengths on which the country can build its T&T competitiveness, including its rich in cultural heritage, with seven World Heritage cultural sites and several international fairs and exhibitions held in the country. Price competitiveness also continues to be an important consideration, ranked 4th, with competitive hotel prices, low fuel costs, and low prices more generally.

### Sub-Saharan Africa

Table 7 shows the results for the sub-Saharan region which sees **the Seychelles** entering the rankings for the first time at the top of the region, and 38th overall. The importance of Travel & Tourism for the country's economy is reflected in its top ranking for the prioritization of the industry, with the 2nd highest T&T expenditure-to-GDP ratio in the world and effective marketing and branding campaigns. These efforts are reinforced by a strong national affinity for Travel & Tourism (5th); good tourism infrastructure, especially in terms of available hotel rooms (6th); and good ground and air transport infrastructures, particularly by regional standards (31st and 27th, respectively). These positive attributes somewhat make up for its relative lack of price competitiveness (120th). Although the natural environment is now assessed as being in good condition, efforts to develop the industry in a sustainable way could be reinforced, for example by increasing marine and terrestrial protection, which would help to protect the many threatened species in the country (132nd).

**Mauritius** loses its number one spot in the regional rankings, overtaken by the entry of the Seychelles this year, and is ranked 58th overall. The prioritization of the industry remains high (3rd), together with a strong national affinity for Travel & Tourism (6th). The country's tourism and ground infrastructure are well developed by regional standards (48th and 37th, respectively), and its policy environment is supportive of the development of the sector (ranked 28th). Mauritius also benefits from high marks for safety and security (36th). However, the country has seen its price competitiveness decline significantly (ranked 75th, down from 18th in the last assessment)—primarily the result of increasing hotel and fuel prices and high ticket taxes and airport charges. Additionally, in terms of challenges, the country's environmental sustainability has received a weakened assessment, of particular concern given the importance of the natural environment for the country's leisure tourism.

**South Africa** is ranked 3rd in the region and 64th overall, gaining two places since the last edition. South Africa comes in high at 17th place for its natural resources and 58th for its cultural resources, based on its many World Heritage sites, its rich fauna, its creative industries, and the many international fairs and

Table 7: The Travel &amp; Tourism Competitiveness Index 2013: Sub-Saharan Africa

Country/Economy	OVERALL INDEX			SUBINDEXES					
	Regional rank	Overall rank	Score	T&T regulatory framework		Business environment and infrastructure		T&T human, cultural, and natural resources	
				Rank	Score	Rank	Score	Rank	Score
Seychelles	1	38	4.51	47	4.94	42	4.35	48	4.26
Mauritius	2	58	4.28	32	5.16	55	4.04	93	3.65
South Africa	3	64	4.13	81	4.44	59	3.93	57	4.03
Cape Verde	4	87	3.87	79	4.45	66	3.72	107	3.45
Namibia	5	91	3.77	89	4.30	70	3.62	115	3.38
Gambia, The	6	92	3.73	72	4.50	93	3.27	111	3.43
Botswana	7	94	3.71	84	4.38	91	3.31	112	3.43
Kenya	8	96	3.66	108	3.98	105	2.98	60	4.01
Rwanda	9	105	3.56	78	4.46	117	2.74	104	3.49
Senegal	10	107	3.49	111	3.91	113	2.84	88	3.71
Zambia	11	108	3.46	102	4.11	122	2.69	98	3.60
Tanzania	12	109	3.46	118	3.67	125	2.68	59	4.02
Uganda	13	116	3.39	116	3.71	121	2.70	79	3.76
Ghana	14	117	3.38	113	3.86	108	2.94	117	3.35
Zimbabwe	15	118	3.33	117	3.67	116	2.76	101	3.56
Swaziland	16	119	3.31	107	4.02	106	2.96	135	2.94
Ethiopia	17	120	3.29	122	3.60	127	2.65	97	3.61
Cameroon	18	121	3.27	123	3.58	124	2.68	102	3.56
Malawi	19	124	3.22	115	3.77	135	2.48	113	3.43
Mozambique	20	125	3.17	121	3.64	120	2.72	130	3.15
Côte d'Ivoire	21	126	3.15	133	3.31	118	2.73	114	3.41
Nigeria	22	127	3.14	135	3.26	114	2.83	118	3.33
Burkina Faso	23	128	3.12	120	3.64	134	2.55	129	3.16
Mali	24	129	3.11	128	3.45	129	2.61	121	3.28
Benin	25	130	3.09	127	3.46	130	2.61	126	3.20
Madagascar	26	131	3.09	132	3.33	119	2.73	127	3.20
Lesotho	27	135	2.89	126	3.46	132	2.60	139	2.62
Guinea	28	136	2.88	136	3.24	137	2.38	134	3.03
Sierra Leone	29	137	2.87	129	3.43	138	2.36	137	2.81
Burundi	30	138	2.82	130	3.40	139	2.33	138	2.73
Chad	31	139	2.61	139	2.90	140	2.11	136	2.82

exhibitions held in the country. Infrastructure in South Africa is also well developed for the region, with air transport infrastructure ranked 43rd and a particularly good assessment of railroad quality (46th) and road quality (42nd). Overall, policy rules and regulations are conducive to the sector's development (ranked 29th); this is an area where the country has improved steadily over the past few assessments, with well-protected property rights and few visa requirements for visitors. Indeed, tourism continues to be one of the five priority sectors in the country's growth plan, and the government has reviewed tourism legislation in an effort to streamline it further. However, there are also some areas of weakness that have brought down the country's overall ranking. Safety and security remains quite worrisome (ranked 117th), as does the level of health and hygiene (87th)—the result of low physician density and concerns about access to improved sanitation. Related to this, human resources are also negatively affected by the poor health of much of the workforce, with a low life expectancy (129th, at 52 years) driven by high rates of communicable diseases such as HIV (137th). Improving the health of the

workforce is of urgent concern for the future of the T&T sector, as well as for all other sectors in the economy. Additionally, this year South Africa has experienced an increase in fuel prices (77th) and ticket taxes and airport charges (105th), which have diminished its price competitiveness.

**Namibia** reaches 5th place the regional rankings, coming in at 91st overall. The country benefits from its rich natural resources, with rich fauna and a pristine natural environment. Indeed, environmental sustainability is prioritized to some extent in the country (ranked 36th), which is critical given the importance of the quality of the environment for Namibia's tourism. In addition, ground transport infrastructure is somewhat developed by regional standards (60th). In order to further develop the sector, a more conducive policy environment will be important. For example, despite efforts in recent years, it remains costly and time consuming to start a business. Health and hygiene is also not up to international standards (106th): the country has few doctors and insufficient access to improved sanitation and drinking water. More generally, improving the country's human

resources base (130th) through better education and training and more conducive labor laws will be critical.

**Botswana** is ranked 7th in the region and 94th overall, down three places since the last edition of the Index. The country, known for its beautiful natural parks, is ranked 39th out of all countries for its natural resources, with much nationally protected land area, rich fauna, and limited environmental damage. The country also benefits from excellent price competitiveness, where it is ranked 12th because of low ticket taxes and airport charges and a favorable tax regime. In addition, some aspects of the policy environment are supportive of the sector's development, including well-protected property rights and few visa restrictions. However, Botswana does face some challenges that lead to its rather low ranking overall. The country's bilateral Air Service Agreements are not rewarded as open (120th), and much time is still required to start a new business (61 days, placing the country 131st). Further, Botswana's transport and ICT infrastructures are somewhat underdeveloped, as is its tourism infrastructure, with a low hotel room concentration, a limited presence of international car rental companies, and relatively few ATMs. Despite slight improvements, some concerns remain in the area of health and hygiene (97th), attributable to a low physician density, limited hospital beds, and insufficient access to improved sanitation. Associated with this, Botswana's greatest comparative weakness is the health of the workforce.

**Kenya**, a country long famous for its tourism attributes, is ranked 8th regionally and 96th overall, rising seven places since the last assessment. Kenya is ranked 14th for its natural resources, with its three World Heritage natural sites and its rich diversity of fauna. Tourism is a recognized priority within the country (ranked 23rd on this pillar), with high government spending on the sector and effective destination-marketing campaigns. In addition, a strong focus on environmental sustainability results in a rank of 21st, which is particularly important for Kenya given the sector's dependence on the natural environment. This focus seems to be bearing fruit and contributes to the overall improvement of Kenya in the rankings. On the downside, the policy environment presents a mixed picture and is not sufficiently conducive to the development of the sector (ranked 95th). Although openness in terms of visa requirements and bilateral Air Service Agreements has improved significantly, property rights are insufficiently protected, and much time and high costs are still required to start a business. In addition, infrastructure remains underdeveloped and health and hygiene levels require improvement, as does the human resources base (106th). Finally, the security situation in the country remains a significant hindrance to further developing the sector (ranked 135th).

**Tanzania** ranks 12th in the region and 109th overall, moving up one place since the last assessment. Tanzania's biggest attraction for tourists remains its outstanding endowment in natural resources (4th), with several World Heritage natural sites, rich fauna, and much protected land area. This is buttressed by some focus in the country on environmental sustainability (ranked 45th). However, protecting the country's rich fauna remains challenging, as demonstrated by the low rank (110th) for the percentage of threatened species in the country. Tanzania's policy environment has improved significantly in terms of the openness of the country's bilateral Air Service Agreements and visa requirements. Nonetheless, further efforts are required in the area by better protecting property rights (103th) and lowering the costs and time required to start a business. The other main issues of concern are insufficient safety and security (120th) and infrastructure that requires significant upgrading. Another area Tanzania should focus on must be improving the human resources base (116th), especially the improving health of the workforce and upgrading the educational system.

**Zimbabwe** is ranked 118th, up one place since last year, yet with an extremely low ranking for a country that was, until relatively recently, a popular tourist destination. Indeed, Zimbabwe is ranked 22nd for its rich natural resources, which have long drawn international travelers to the country, and a number of World Heritage natural sites, much nationally protected land area, and rich fauna. Despite these strengths, the Index mainly highlights weaknesses in other areas. The policy environment continues to be among the least supportive of T&T industry development in the world (ranked 138th), with extremely poor assessments for laws related to FDI and property rights; furthermore, starting a business is extremely time consuming and costly. Safety and security is also a major concern, with high crime and violence and a lack of trust in the police to provide protection from crime (120th). There are also major concerns related to human resources (134th), with low enrollment rates in primary and secondary education by international standards, and among the worst health indicators in the world.

**Nigeria** is ranked 22nd in the region and 127th overall, an improvement of three places since the last assessment. Nigeria has important natural resources that could be leveraged to develop its T&T industry, which would usher in benefits to its overall economy and to its development agenda. However, Nigeria's T&T competitiveness continues to be held back by several issues that are also important for its general economic development. The country's safety and security is among the poorest in the world (136th), as are health and hygiene levels (133th). Infrastructures require significant upgrading, especially ground transport (119th) and tourism infrastructure (103rd). Additionally, policy

rules and regulation are not sufficiently supportive of the development of the sector, with insufficiently protected property rights (116th), significant costs and time needed to start a business, and extensive visa requirements (126th). Moreover, Nigeria suffers from a lack of price competitiveness, particularly by regional standards, with very high ticket taxes and charges and hotel prices. Yet the T&T sector is not seen a high priority for the country (133th), which may make efforts across these many areas all the more difficult.

Several African countries are ranked below the 120th position overall, including the two newly covered economies **Guinea** (136th) and **Sierra Leone** (137th). These countries must address many of the basic factors required to make it attractive to develop their T&T sectors, including improved safety and security, health, and infrastructure.

## CONCLUSIONS

We have looked at the T&T competitiveness of 140 economies, spanning all regions of the world, based on the World Economic Forum's Travel & Tourism Competitiveness Index (TTCI). 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.

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 economies as well as the barriers that impede the development of the sector. The Index also allows economies to track their progress over time on those indicators of interest.

We will continue to publish *The Travel & Tourism Competitiveness Report* on a biennial basis, ensuring that the TTCI can continue to 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 improving the growth prospects and prosperity of their citizens.

## NOTE

- 1 For more information on the World Economic Forum's work on sustainable competitiveness, see Sala-i-Martin et al. 2012.

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## 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: 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 data derived from the Executive Opinion Survey (Survey) and quantitative data from other sources.

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.<sup>1</sup>

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.

Variables that are not derived from the Survey are identified by an asterisk on the following pages.

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#### 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\*
- 1.05 Openness of bilateral Air Service Agreements\*
- 1.06 Transparency of government policymaking
- 1.07 Time required to start a business\*
- 1.08 Cost to start a business\*
- 1.09 GATS commitments restrictiveness index of T&T services\*

##### 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\*
- 2.05 Particulate matter concentration\*
- 2.06 Threatened species\*
- 2.07 Environmental treaty ratification\*

##### 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\*

##### Pillar 4: Health and hygiene

- 4.01 Physician density\*
- 4.02 Access to improved sanitation\*
- 4.03 Access to improved drinking water\*
- 4.04 Hospital beds\*

##### Pillar 5: Prioritization of Travel & Tourism

- 5.01 Government prioritization of the T&T industry
- 5.02 T&T government expenditure\*
- 5.03 Effectiveness of marketing and branding to attract tourists
- 5.04 Comprehensiveness of annual T&T data\*<sup>2</sup>
- 5.05 Timeliness of providing monthly/quarterly T&T data\*<sup>2</sup>

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#### 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, domestic\*<sup>3</sup>
- 6.03 Available seat kilometers, international\*<sup>3</sup>
- 6.04 Departures per 1,000 population\*
- 6.05 Airport density\*
- 6.06 Number of operating airlines\*
- 6.07 International air transport network\*

**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\*

**Pillar 8: Tourism infrastructure**

- 8.01 Hotel rooms\*
- 8.02 Presence of major car rental companies\*
- 8.03 ATMs accepting Visa cards\*

**Pillar 9: ICT infrastructure**

- 9.01 ICT use for business-to-business transactions<sup>2</sup>
- 9.02 ICT use for business-to-consumers transactions<sup>2</sup>
- 9.03 Individuals using the Internet\*
- 9.04 Telephone lines\*
- 9.05 Broadband Internet subscribers\*
- 9.06 Mobile telephone subscriptions\*
- 9.07 Mobile broadband subscriptions\*

**Pillar 10: Price competitiveness in the T&T industry**

- 10.01 Ticket taxes and airport charges\*
- 10.02 Purchasing power parity\*
- 10.03 Extent and effect of taxation
- 10.04 Fuel price levels\*
- 10.05 Hotel price index\*

**SUBINDEX C: T&T HUMAN, CULTURAL, AND NATURAL RESOURCES****Pillar 11: Human resources***Education and training*

- 11.01 Primary education enrollment\*
- 11.02 Secondary education enrollment\*
- 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<sup>4</sup>
- 11.09 Business impact of HIV/AIDS<sup>4</sup>
- 11.10 Life expectancy\*

**Pillar 12: Affinity for Travel & Tourism**

- 12.01 Tourism openness\*
- 12.02 Attitude of population toward foreign visitors
- 12.03 Extension of business trips recommended
- 12.04 Degree of customer orientation

**Pillar 13: Natural resources**

- 13.01 Number of World Heritage natural sites\*
- 13.02 Quality of the natural environment
- 13.03 Total known species\*
- 13.04 Terrestrial biome protection<sup>2</sup>
- 13.05 Marine protected areas<sup>2</sup>

**Pillar 14: Cultural resources**

- 14.01 Number of World Heritage cultural sites\*
- 14.02 Sports stadiums\*
- 14.03 Number of international fairs and exhibitions\*
- 14.04 Creative industries exports\*

**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, 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 These variables are combined applying a simple average aggregation to form one single variable. Consequently, they are implicitly weighted by a 0.5 factor.
- 3 Variables 6.02 *Available seat kilometers, domestic* and 6.03 *Available seat kilometers, international* are summed to form one single variable.
- 4 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 incidences receive a 7, regardless of their scores on the related Survey question.



## Appendix B:

### Travel & Tourism Competitiveness Index 2013 detailed rankings

In this appendix we present the detailed rankings and scores of the Travel & Tourism Competitiveness Index for 2013 for all 140 economies covered this year. This complements the regional rankings shown in the chapter.

**Table B1: The Travel & Tourism Competitiveness Index 2013**

Economy	OVERALL INDEX		SUBINDEXES					
	Rank	Score	T&T regulatory framework		Business environment and infrastructure		T&T human, cultural, and natural resources	
	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Albania	77	3.97	63	4.65	90	3.31	63	3.96
Algeria	132	3.07	134	3.30	126	2.66	123	3.25
Argentina	61	4.17	69	4.54	72	3.61	41	4.38
Armenia	79	3.96	51	4.88	88	3.34	94	3.65
Australia	11	5.17	23	5.32	25	4.81	4	5.39
Austria	3	5.39	2	5.80	11	5.11	9	5.24
Azerbaijan	78	3.97	46	4.94	87	3.34	96	3.63
Bahrain	55	4.30	77	4.46	32	4.69	83	3.74
Bangladesh	123	3.24	124	3.56	109	2.91	124	3.24
Barbados	27	4.88	13	5.50	18	4.96	50	4.20
Belgium	18	5.04	18	5.43	26	4.78	18	4.90
Benin	130	3.09	127	3.46	130	2.61	126	3.20
Bolivia	110	3.46	125	3.55	102	3.09	85	3.73
Bosnia and Herzegovina	90	3.78	75	4.47	95	3.19	92	3.66
Botswana	94	3.71	84	4.38	91	3.31	112	3.43
Brazil	51	4.37	82	4.43	76	3.57	12	5.10
Brunei Darussalam	72	4.01	94	4.18	57	3.94	67	3.91
Bulgaria	50	4.38	58	4.79	45	4.24	53	4.10
Burkina Faso	128	3.12	120	3.64	134	2.55	129	3.16
Burundi	138	2.82	130	3.40	139	2.33	138	2.73
Cambodia	106	3.56	105	4.06	112	2.86	78	3.77
Cameroon	121	3.27	123	3.58	124	2.68	102	3.56
Canada	8	5.28	27	5.27	8	5.17	5	5.39
Cape Verde	87	3.87	79	4.45	66	3.72	107	3.45
Chad	139	2.61	139	2.90	140	2.11	136	2.82
Chile	56	4.29	53	4.87	53	4.07	65	3.94
China	45	4.45	71	4.50	63	3.77	13	5.09
Colombia	84	3.90	101	4.11	103	3.09	34	4.51
Costa Rica	47	4.44	52	4.88	56	3.98	38	4.45
Côte d'Ivoire	126	3.15	133	3.31	118	2.73	114	3.41
Croatia	35	4.59	42	4.99	39	4.43	42	4.37
Cyprus	29	4.84	22	5.35	21	4.89	46	4.27
Czech Republic	31	4.78	28	5.24	37	4.49	28	4.61
Denmark	21	4.98	25	5.31	16	4.98	26	4.64
Dominican Republic	86	3.88	67	4.60	75	3.58	108	3.45
Ecuador	81	3.93	85	4.37	83	3.38	56	4.05
Egypt	85	3.88	86	4.35	77	3.56	84	3.74
El Salvador	104	3.59	99	4.14	82	3.39	125	3.24
Estonia	30	4.82	10	5.55	30	4.72	51	4.19
Ethiopia	120	3.29	122	3.60	127	2.65	97	3.61
Finland	17	5.10	5	5.74	22	4.89	24	4.65
France	7	5.31	9	5.56	7	5.18	11	5.20
Gambia, The	92	3.73	72	4.50	93	3.27	111	3.43
Georgia	66	4.10	30	5.18	80	3.46	91	3.67

Table B1: The Travel &amp; Tourism Competitiveness Index 2013 (cont'd.)

Economy	SUBINDEXES							
	OVERALL INDEX		T&T regulatory framework		Business environment and infrastructure		T&T human, cultural, and natural resources	
	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Germany	2	5.39	8	5.57	6	5.29	7	5.31
Ghana	117	3.38	113	3.86	108	2.94	117	3.35
Greece	32	4.75	39	5.02	33	4.65	30	4.58
Guatemala	97	3.65	109	3.93	98	3.15	69	3.88
Guinea	136	2.88	136	3.24	137	2.38	134	3.03
Guyana	103	3.60	80	4.44	111	2.88	106	3.47
Haiti	140	2.59	138	2.93	136	2.39	140	2.44
Honduras	93	3.72	97	4.17	92	3.28	89	3.69
Hong Kong SAR	15	5.11	19	5.43	3	5.32	29	4.59
Hungary	39	4.51	26	5.29	49	4.16	54	4.08
Iceland	16	5.10	3	5.77	13	5.06	36	4.47
India	65	4.11	110	3.92	67	3.69	21	4.72
Indonesia	70	4.03	95	4.18	84	3.36	31	4.56
Iran, Islamic Rep.	98	3.64	112	3.90	96	3.18	74	3.85
Ireland	19	5.01	7	5.68	19	4.96	40	4.41
Israel	53	4.34	36	5.07	51	4.08	71	3.86
Italy	26	4.90	50	4.90	29	4.76	14	5.05
Jamaica	67	4.08	59	4.76	64	3.76	87	3.72
Japan	14	5.13	24	5.31	24	4.86	10	5.22
Jordan	60	4.18	37	5.05	69	3.63	72	3.86
Kazakhstan	88	3.82	62	4.66	79	3.48	119	3.30
Kenya	96	3.66	108	3.98	105	2.98	60	4.01
Korea, Rep.	25	4.91	38	5.02	17	4.98	20	4.74
Kuwait	101	3.61	114	3.81	62	3.89	131	3.14
Kyrgyz Republic	111	3.45	93	4.23	131	2.61	103	3.51
Latvia	48	4.43	35	5.08	40	4.40	77	3.81
Lebanon	69	4.04	73	4.50	65	3.74	70	3.87
Lesotho	135	2.89	126	3.46	132	2.60	139	2.62
Lithuania	49	4.39	41	4.99	48	4.19	61	3.98
Luxembourg	23	4.93	21	5.41	20	4.96	39	4.42
Macedonia, FYR	75	3.98	57	4.79	74	3.58	100	3.58
Madagascar	131	3.09	132	3.33	119	2.73	127	3.20
Malawi	124	3.22	115	3.77	135	2.48	113	3.43
Malaysia	34	4.70	55	4.82	41	4.36	17	4.93
Mali	129	3.11	128	3.45	129	2.61	121	3.28
Malta	24	4.92	15	5.47	14	5.06	49	4.22
Mauritania	134	2.91	137	3.07	133	2.60	132	3.07
Mauritius	58	4.28	32	5.16	55	4.04	93	3.65
Mexico	44	4.46	83	4.43	61	3.92	15	5.02
Moldova	102	3.60	65	4.61	97	3.16	133	3.04
Mongolia	99	3.63	91	4.25	107	2.96	90	3.69
Montenegro	40	4.50	34	5.09	50	4.14	47	4.26
Morocco	71	4.03	68	4.59	73	3.60	68	3.89
Mozambique	125	3.17	121	3.64	120	2.72	130	3.15
Namibia	91	3.77	89	4.30	70	3.62	115	3.38
Nepal	112	3.42	100	4.14	128	2.64	105	3.48
Netherlands	13	5.14	16	5.45	15	5.01	16	4.97
New Zealand	12	5.17	4	5.75	12	5.06	22	4.69
Nicaragua	95	3.67	98	4.15	101	3.11	82	3.74
Nigeria	127	3.14	135	3.26	114	2.83	118	3.33
Norway	22	4.95	11	5.55	28	4.77	33	4.53
Oman	57	4.29	56	4.81	47	4.20	76	3.84
Pakistan	122	3.25	131	3.38	104	2.99	116	3.38
Panama	37	4.54	54	4.83	36	4.52	45	4.29
Paraguay	115	3.39	103	4.09	115	2.80	120	3.29
Peru	73	4.00	96	4.17	85	3.36	37	4.47
Philippines	82	3.93	70	4.51	89	3.33	64	3.95
Poland	42	4.47	49	4.92	58	3.94	32	4.56
Portugal	20	5.01	20	5.42	27	4.78	19	4.84
Puerto Rico	52	4.36	40	4.99	43	4.33	81	3.75

(Cont'd.)

Table B1: The Travel &amp; Tourism Competitiveness Index 2013 (cont'd.)

Economy	OVERALL INDEX		SUBINDEXES					
	Rank	Score	T&T regulatory framework		Business environment and infrastructure		T&T human, cultural, and natural resources	
	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Qatar	41	4.49	48	4.93	31	4.70	75	3.85
Romania	68	4.04	66	4.61	68	3.67	73	3.85
Russian Federation	63	4.16	92	4.24	46	4.22	58	4.02
Rwanda	105	3.56	78	4.46	117	2.74	104	3.49
Saudi Arabia	62	4.17	87	4.32	38	4.43	80	3.76
Senegal	107	3.49	111	3.91	113	2.84	88	3.71
Serbia	89	3.78	74	4.50	81	3.40	109	3.45
Seychelles	38	4.51	47	4.94	42	4.35	48	4.26
Sierra Leone	137	2.87	129	3.43	138	2.36	137	2.81
Singapore	10	5.23	6	5.74	4	5.31	25	4.64
Slovak Republic	54	4.32	43	4.96	60	3.92	55	4.06
Slovenia	36	4.58	33	5.12	35	4.52	52	4.11
South Africa	64	4.13	81	4.44	59	3.93	57	4.03
Spain	4	5.38	14	5.48	5	5.30	6	5.36
Sri Lanka	74	3.99	61	4.68	86	3.35	66	3.93
Suriname	100	3.63	106	4.05	100	3.11	86	3.72
Swaziland	119	3.31	107	4.02	106	2.96	135	2.94
Sweden	9	5.24	12	5.54	23	4.89	8	5.30
Switzerland	1	5.66	1	5.94	1	5.42	2	5.63
Taiwan, China	33	4.71	29	5.19	34	4.63	44	4.29
Tajikistan	114	3.41	90	4.28	123	2.69	122	3.26
Tanzania	109	3.46	118	3.67	125	2.68	59	4.02
Thailand	43	4.47	76	4.47	44	4.25	23	4.68
Trinidad and Tobago	83	3.93	104	4.07	54	4.07	95	3.64
Turkey	46	4.44	64	4.62	52	4.08	27	4.63
Uganda	116	3.39	116	3.71	121	2.70	79	3.76
Ukraine	76	3.98	60	4.73	71	3.62	99	3.59
United Arab Emirates	28	4.86	45	4.95	9	5.14	35	4.51
United Kingdom	5	5.38	17	5.44	10	5.13	3	5.57
United States	6	5.32	44	4.95	2	5.36	1	5.65
Uruguay	59	4.23	31	5.18	78	3.53	62	3.97
Venezuela	113	3.41	119	3.67	99	3.12	110	3.45
Vietnam	80	3.95	88	4.30	94	3.26	43	4.30
Yemen	133	2.96	140	2.82	110	2.89	128	3.18
Zambia	108	3.46	102	4.11	122	2.69	98	3.60
Zimbabwe	118	3.33	117	3.67	116	2.76	101	3.56

Table B2: The Travel &amp; Tourism Competitiveness Index 2013: 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	Rank	Score
Albania	63	4.65	69	4.49	62	4.63	65	4.87	69	4.71	59	4.53
Algeria	134	3.30	133	3.32	136	3.40	132	3.35	90	4.15	140	2.28
Argentina	69	4.54	97	4.24	123	3.95	81	4.46	44	5.78	81	4.25
Armenia	51	4.88	46	4.74	114	4.08	37	5.34	39	5.91	73	4.34
Australia	23	5.32	14	5.20	56	4.70	13	5.97	40	5.87	39	4.88
Austria	2	5.80	37	4.89	6	5.64	7	6.11	1	7.00	22	5.38
Azerbaijan	46	4.94	85	4.33	67	4.58	52	5.09	34	5.98	48	4.72
Bahrain	77	4.46	57	4.64	103	4.21	49	5.22	89	4.17	95	4.06
Bangladesh	124	3.56	108	3.99	133	3.58	83	4.43	114	2.80	129	3.00
Barbados	13	5.50	41	4.82	27	5.12	32	5.51	28	6.03	8	5.99
Belgium	18	5.43	31	4.96	13	5.50	16	5.88	11	6.42	66	4.40
Benin	127	3.46	131	3.41	64	4.60	101	4.15	132	1.85	122	3.27
Bolivia	125	3.55	130	3.50	100	4.23	112	3.88	108	3.06	128	3.08
Bosnia and Herzegovina	75	4.47	104	4.05	113	4.10	29	5.59	59	5.16	116	3.46
Botswana	84	4.38	72	4.44	55	4.71	75	4.68	97	3.70	72	4.35
Brazil	82	4.43	119	3.80	30	5.07	73	4.71	70	4.71	102	3.88
Brunei Darussalam	94	4.18	126	3.71	135	3.46	24	5.66	65	4.86	123	3.22
Bulgaria	58	4.79	102	4.15	76	4.50	89	4.34	5	6.72	82	4.25
Burkina Faso	120	3.64	107	3.99	80	4.44	107	4.02	126	2.02	106	3.71
Burundi	130	3.40	91	4.30	102	4.21	133	3.34	117	2.58	138	2.55
Cambodia	105	4.06	128	3.57	75	4.51	78	4.61	129	1.93	13	5.67
Cameroon	123	3.58	111	3.96	108	4.18	102	4.09	116	2.72	132	2.97
Canada	27	5.27	10	5.31	41	4.95	18	5.79	53	5.37	37	4.93
Cape Verde	79	4.45	39	4.86	54	4.71	88	4.36	101	3.58	46	4.74
Chad	139	2.90	139	2.98	111	4.15	138	3.14	139	1.12	127	3.10
Chile	53	4.87	12	5.22	88	4.41	31	5.54	75	4.59	56	4.58
China	71	4.50	86	4.33	109	4.16	67	4.79	82	4.47	45	4.74
Colombia	101	4.11	56	4.64	97	4.27	115	3.84	100	3.59	88	4.20
Costa Rica	52	4.88	68	4.52	26	5.18	68	4.78	78	4.53	20	5.38
Côte d'Ivoire	133	3.31	127	3.69	96	4.28	127	3.58	124	2.20	136	2.79
Croatia	42	4.99	96	4.24	44	4.89	38	5.32	31	6.00	61	4.48
Cyprus	22	5.35	88	4.33	38	4.99	27	5.62	45	5.71	2	6.12
Czech Republic	28	5.24	59	4.61	29	5.07	40	5.30	4	6.76	64	4.44
Denmark	25	5.31	27	5.02	5	5.82	28	5.61	36	5.97	92	4.11
Dominican Republic	67	4.60	51	4.70	106	4.19	111	3.90	85	4.27	9	5.93
Ecuador	85	4.37	89	4.32	65	4.60	104	4.05	76	4.59	76	4.30
Egypt	86	4.35	76	4.42	121	3.95	140	2.65	57	5.27	18	5.47
El Salvador	99	4.14	83	4.35	86	4.42	122	3.65	88	4.18	93	4.10
Estonia	10	5.55	26	5.03	14	5.41	25	5.62	20	6.17	16	5.51
Ethiopia	122	3.60	132	3.35	90	4.36	90	4.34	118	2.44	115	3.49
Finland	5	5.74	7	5.42	3	5.89	1	6.49	15	6.33	53	4.60
France	9	5.56	25	5.04	11	5.59	33	5.49	6	6.67	35	4.99
Gambia, The	72	4.50	65	4.54	34	5.01	84	4.41	105	3.33	25	5.21
Georgia	30	5.18	40	4.83	74	4.52	51	5.11	37	5.96	17	5.50
Germany	8	5.57	33	4.94	4	5.83	14	5.97	2	6.85	77	4.28
Ghana	113	3.86	78	4.41	42	4.91	98	4.25	122	2.31	119	3.42
Greece	39	5.02	98	4.22	72	4.53	69	4.74	13	6.42	28	5.17
Guatemala	109	3.93	82	4.37	126	3.90	129	3.50	95	3.81	94	4.08
Guinea	136	3.24	134	3.27	82	4.43	119	3.74	130	1.87	134	2.89
Guyana	80	4.44	52	4.68	32	5.07	110	3.97	93	4.10	65	4.41
Haiti	138	2.93	135	3.22	139	2.86	130	3.44	128	1.96	124	3.20
Honduras	97	4.17	73	4.44	57	4.69	126	3.59	103	3.55	57	4.58
Hong Kong SAR	19	5.43	3	5.64	118	4.01	3	6.27	50	5.56	12	5.67
Hungary	26	5.29	43	4.76	28	5.10	41	5.30	9	6.55	49	4.71
Iceland	3	5.77	48	4.72	19	5.31	4	6.21	7	6.55	5	6.05
India	110	3.92	125	3.71	107	4.19	74	4.69	109	3.04	98	3.95
Indonesia	95	4.18	93	4.27	125	3.90	85	4.41	112	2.86	19	5.45
Iran, Islamic Rep.	112	3.90	124	3.72	101	4.23	106	4.04	79	4.52	130	2.97
Ireland	7	5.68	4	5.46	9	5.62	12	5.98	23	6.14	27	5.18
Israel	36	5.07	42	4.79	60	4.66	46	5.25	26	6.06	54	4.60

(Cont'd.)

Table B2: The Travel &amp; Tourism Competitiveness Index 2013: Regulatory framework (cont'd.)

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
Italy	50	4.90	100	4.21	53	4.73	44	5.26	29	6.02	79	4.27
Jamaica	59	4.76	20	5.13	98	4.26	95	4.27	92	4.12	7	6.00
Japan	24	5.31	36	4.89	47	4.82	20	5.73	16	6.30	42	4.80
Jordan	37	5.05	35	4.90	46	4.84	72	4.74	60	5.13	14	5.63
Kazakhstan	62	4.66	99	4.21	124	3.92	99	4.24	3	6.79	90	4.16
Kenya	108	3.98	95	4.26	21	5.23	135	3.19	131	1.87	23	5.35
Korea, Rep.	38	5.02	50	4.71	69	4.58	39	5.31	19	6.19	75	4.32
Kuwait	114	3.81	122	3.76	140	2.74	47	5.23	62	5.02	139	2.31
Kyrgyz Republic	93	4.23	71	4.44	129	3.84	100	4.16	52	5.44	121	3.29
Latvia	35	5.08	58	4.63	18	5.32	53	5.07	32	6.00	70	4.36
Lebanon	73	4.50	115	3.90	127	3.88	116	3.82	33	5.98	38	4.91
Lesotho	126	3.46	116	3.83	120	3.96	108	4.02	121	2.33	125	3.19
Lithuania	41	4.99	75	4.42	20	5.24	56	4.94	18	6.22	91	4.13
Luxembourg	21	5.41	11	5.30	17	5.34	11	6.04	21	6.15	86	4.23
Macedonia, FYR	57	4.79	66	4.53	73	4.52	43	5.28	47	5.68	99	3.95
Madagascar	132	3.33	112	3.96	122	3.95	134	3.22	138	1.16	67	4.39
Malawi	115	3.77	121	3.77	50	4.77	94	4.28	111	2.88	126	3.16
Malaysia	55	4.82	9	5.33	61	4.66	66	4.82	73	4.63	51	4.67
Mali	128	3.45	105	4.04	110	4.15	128	3.55	134	1.56	101	3.94
Malta	15	5.47	63	4.57	48	4.81	15	5.90	27	6.06	6	6.04
Mauritania	137	3.07	129	3.53	117	4.02	123	3.64	135	1.37	135	2.81
Mauritius	32	5.16	28	5.01	77	4.49	36	5.34	66	4.85	3	6.12
Mexico	83	4.43	54	4.67	105	4.20	121	3.65	72	4.66	34	4.99
Moldova	65	4.61	81	4.38	93	4.29	61	4.89	41	5.86	112	3.62
Mongolia	91	4.25	79	4.40	137	3.24	64	4.89	67	4.80	100	3.95
Montenegro	34	5.09	22	5.12	33	5.02	45	5.26	55	5.32	44	4.75
Morocco	68	4.59	44	4.76	31	5.07	80	4.51	104	3.39	26	5.20
Mozambique	121	3.64	90	4.32	49	4.77	125	3.63	136	1.26	87	4.20
Namibia	89	4.30	64	4.55	36	5.00	96	4.27	106	3.30	68	4.39
Nepal	100	4.14	106	4.04	89	4.36	109	3.99	102	3.56	47	4.72
Netherlands	16	5.45	15	5.19	10	5.60	6	6.11	30	6.00	71	4.36
New Zealand	4	5.75	2	5.84	22	5.23	9	6.05	17	6.26	21	5.38
Nicaragua	98	4.15	101	4.18	43	4.90	82	4.44	110	3.00	83	4.24
Nigeria	135	3.26	117	3.82	63	4.61	136	3.17	133	1.74	133	2.94
Norway	11	5.55	21	5.13	8	5.62	10	6.05	22	6.15	43	4.78
Oman	56	4.81	38	4.88	87	4.42	30	5.57	71	4.69	60	4.49
Pakistan	131	3.38	120	3.79	132	3.73	137	3.14	107	3.28	131	2.97
Panama	54	4.83	18	5.14	40	4.96	70	4.74	86	4.23	32	5.06
Paraguay	103	4.09	110	3.98	104	4.20	114	3.86	96	3.72	52	4.67
Peru	96	4.17	70	4.48	85	4.42	118	3.77	98	3.66	58	4.54
Philippines	70	4.51	53	4.68	83	4.43	103	4.06	94	3.82	15	5.59
Poland	49	4.92	84	4.35	37	5.00	48	5.23	35	5.98	96	4.04
Portugal	20	5.42	49	4.72	15	5.38	19	5.77	25	6.07	29	5.16
Puerto Rico	40	4.99	19	5.14	16	5.34	62	4.89	68	4.74	41	4.85
Qatar	48	4.93	47	4.72	59	4.66	21	5.73	58	5.25	80	4.26
Romania	66	4.61	87	4.33	58	4.67	63	4.89	54	5.36	103	3.77
Russian Federation	92	4.24	123	3.75	134	3.55	113	3.87	14	6.40	111	3.63
Rwanda	78	4.46	6	5.43	12	5.54	59	4.92	119	2.44	97	3.97
Saudi Arabia	87	4.32	61	4.59	130	3.84	42	5.30	99	3.60	78	4.27
Senegal	111	3.91	109	3.99	81	4.43	86	4.40	120	2.37	69	4.37
Serbia	74	4.50	103	4.10	115	4.06	55	4.99	46	5.70	108	3.64
Seychelles	47	4.94	55	4.66	70	4.57	91	4.32	63	5.01	1	6.12
Sierra Leone	129	3.43	118	3.81	84	4.43	93	4.29	137	1.17	118	3.45
Singapore	6	5.74	1	5.99	23	5.22	5	6.13	56	5.29	4	6.07
Slovak Republic	43	4.96	45	4.75	39	4.98	54	5.00	12	6.42	107	3.67
Slovenia	33	5.12	92	4.27	24	5.20	26	5.62	42	5.82	50	4.69
South Africa	81	4.44	29	4.99	52	4.74	117	3.80	87	4.20	62	4.46
Spain	14	5.48	67	4.52	25	5.19	23	5.67	24	6.11	10	5.91
Sri Lanka	61	4.68	62	4.59	119	4.00	35	5.34	83	4.37	31	5.10
Suriname	106	4.05	136	3.10	68	4.58	60	4.89	91	4.13	114	3.57

Table B2: The Travel &amp; Tourism Competitiveness Index 2013: Regulatory framework (cont'd.)

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
Swaziland	107	4.02	94	4.27	71	4.55	92	4.30	113	2.82	89	4.17
Sweden	12	5.54	16	5.17	1	6.12	8	6.10	38	5.96	74	4.34
Switzerland	1	5.94	17	5.17	2	6.00	2	6.30	10	6.53	11	5.72
Taiwan, China	29	5.19	5	5.46	94	4.28	17	5.82	43	5.79	55	4.60
Tajikistan	90	4.28	113	3.91	79	4.44	71	4.74	77	4.57	104	3.76
Tanzania	118	3.67	74	4.43	45	4.89	120	3.70	140	1.12	85	4.23
Thailand	76	4.47	77	4.41	99	4.26	87	4.37	84	4.32	33	5.01
Trinidad and Tobago	104	4.07	30	4.98	138	3.23	105	4.04	74	4.62	117	3.45
Turkey	64	4.62	34	4.92	95	4.28	79	4.55	64	4.89	63	4.46
Uganda	116	3.71	80	4.39	51	4.76	124	3.64	125	2.12	109	3.64
Ukraine	60	4.73	114	3.90	92	4.30	77	4.65	8	6.55	84	4.24
United Arab Emirates	45	4.95	13	5.20	91	4.35	50	5.17	61	5.05	36	4.96
United Kingdom	17	5.44	8	5.34	7	5.63	22	5.70	48	5.67	40	4.87
United States	44	4.95	23	5.09	112	4.13	57	4.93	51	5.46	30	5.14
Uruguay	31	5.18	24	5.07	78	4.46	34	5.42	49	5.62	24	5.33
Venezuela	119	3.67	137	3.07	116	4.03	131	3.39	80	4.52	120	3.35
Vietnam	88	4.30	60	4.60	128	3.85	58	4.92	81	4.50	110	3.64
Yemen	140	2.82	140	2.72	131	3.76	139	3.01	127	2.01	137	2.61
Zambia	102	4.11	32	4.96	35	5.01	76	4.67	123	2.29	113	3.60
Zimbabwe	117	3.67	138	3.04	66	4.59	97	4.26	115	2.74	105	3.74

Table B3: The Travel &amp; Tourism Competitiveness Index 2013: Business environment and infrastructure

Country/Economy	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 the T&T industry	
			Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Albania	90	3.31	98	2.52	85	3.24	76	3.67	97	2.51	64	4.60
Algeria	126	2.66	115	2.24	126	2.63	131	1.44	115	2.02	28	4.97
Argentina	72	3.61	66	3.07	120	2.77	55	4.50	56	3.47	101	4.22
Armenia	88	3.34	85	2.70	94	3.12	80	3.42	73	3.05	80	4.44
Australia	25	4.81	4	5.86	49	4.19	20	5.89	18	5.06	137	3.05
Austria	11	5.11	30	4.44	15	5.61	1	7.00	20	5.00	131	3.52
Azerbaijan	87	3.34	83	2.72	57	4.01	109	2.18	63	3.34	77	4.47
Bahrain	32	4.69	38	4.23	11	5.84	66	4.23	47	3.76	7	5.38
Bangladesh	109	2.91	113	2.27	65	3.77	127	1.64	128	1.74	16	5.16
Barbados	18	4.96	32	4.35	9	5.89	26	5.57	19	5.02	113	3.97
Belgium	26	4.78	37	4.24	8	5.91	28	5.48	26	4.74	128	3.54
Benin	130	2.61	130	1.98	122	2.74	115	2.07	118	1.95	92	4.31
Bolivia	102	3.09	104	2.43	116	2.82	98	2.55	103	2.31	8	5.34
Bosnia and Herzegovina	95	3.19	135	1.82	130	2.57	65	4.24	64	3.25	107	4.06
Botswana	91	3.31	89	2.65	83	3.25	89	2.97	99	2.44	12	5.22
Brazil	76	3.57	48	3.75	129	2.57	60	4.39	55	3.49	126	3.67
Brunei Darussalam	57	3.94	45	3.87	67	3.66	86	3.12	65	3.22	2	5.81
Bulgaria	45	4.24	91	2.64	91	3.14	4	6.72	42	3.94	49	4.77
Burkina Faso	134	2.55	129	1.99	112	2.85	120	1.91	130	1.68	86	4.35
Burundi	139	2.33	138	1.78	107	2.89	137	1.29	139	1.37	88	4.32
Cambodia	112	2.86	106	2.40	81	3.26	132	1.43	112	2.08	19	5.12
Cameroon	124	2.68	117	2.23	111	2.85	114	2.08	123	1.88	85	4.37
Canada	8	5.17	1	6.67	33	4.75	21	5.81	23	4.94	124	3.71
Cape Verde	66	3.72	46	3.85	72	3.53	62	4.31	95	2.56	87	4.35
Chad	140	2.11	139	1.75	127	2.61	136	1.30	137	1.45	132	3.44
Chile	53	4.07	55	3.43	56	4.03	49	4.67	52	3.62	60	4.61
China	63	3.77	35	4.28	51	4.13	101	2.52	74	3.03	37	4.88
Colombia	103	3.09	73	2.93	131	2.56	93	2.83	77	2.93	105	4.18
Costa Rica	56	3.98	44	3.94	100	2.99	33	5.13	67	3.20	56	4.65
Côte d'Ivoire	118	2.73	116	2.24	97	3.06	97	2.60	120	1.90	117	3.86
Croatia	39	4.43	68	3.01	53	4.07	5	6.71	30	4.32	109	4.01
Cyprus	21	4.89	36	4.26	19	5.30	5	6.71	40	3.99	102	4.21
Czech Republic	37	4.49	50	3.70	23	5.16	32	5.15	35	4.23	99	4.23
Denmark	16	4.98	28	4.47	12	5.84	25	5.63	4	5.65	135	3.33
Dominican Republic	75	3.58	59	3.29	71	3.61	70	4.08	85	2.74	104	4.18
Ecuador	83	3.38	84	2.71	79	3.31	84	3.21	98	2.45	11	5.22
Egypt	77	3.56	57	3.38	96	3.11	90	2.93	80	2.83	4	5.58
El Salvador	82	3.39	80	2.76	78	3.43	83	3.26	86	2.73	50	4.75
Estonia	30	4.72	65	3.08	30	4.84	18	6.08	25	4.77	44	4.83
Ethiopia	127	2.65	90	2.65	118	2.78	135	1.32	138	1.44	22	5.09
Finland	22	4.89	11	5.25	20	5.24	44	4.79	13	5.37	118	3.81
France	7	5.18	8	5.39	5	6.24	17	6.10	15	5.21	140	2.96
Gambia, The	93	3.27	81	2.76	50	4.17	126	1.65	110	2.10	3	5.67
Georgia	80	3.46	101	2.48	61	3.85	82	3.26	75	3.02	52	4.67
Germany	6	5.29	7	5.39	6	6.22	23	5.73	11	5.39	125	3.70
Ghana	108	2.94	109	2.35	82	3.25	102	2.39	104	2.26	76	4.48
Greece	33	4.65	20	4.66	58	3.99	3	6.76	33	4.28	127	3.59
Guatemala	98	3.15	100	2.51	114	2.83	96	2.64	88	2.67	23	5.08
Guinea	137	2.38	133	1.87	138	2.22	128	1.64	134	1.63	69	4.56
Guyana	111	2.88	105	2.42	105	2.91	121	1.76	91	2.62	51	4.70
Haiti	136	2.39	131	1.93	140	1.73	110	2.18	131	1.67	78	4.47
Honduras	92	3.28	70	2.95	101	2.97	81	3.27	101	2.39	39	4.85
Hong Kong SAR	3	5.32	6	5.40	1	6.55	71	3.90	2	5.81	32	4.92
Hungary	49	4.16	74	2.91	40	4.51	30	5.20	43	3.90	93	4.29
Iceland	13	5.06	17	4.83	38	4.54	9	6.69	8	5.47	121	3.75
India	67	3.69	39	4.18	42	4.44	95	2.64	111	2.09	20	5.11
Indonesia	84	3.36	54	3.46	87	3.21	113	2.10	87	2.72	9	5.30
Iran, Islamic Rep.	96	3.18	102	2.48	76	3.45	133	1.41	93	2.61	1	5.97
Ireland	19	4.96	22	4.61	24	5.15	12	6.31	24	4.80	115	3.91
Israel	51	4.08	52	3.60	54	4.07	52	4.60	27	4.72	133	3.41



Table B3: The Travel &amp; Tourism Competitiveness Index 2013: Business environment and infrastructure (cont'd.)

Country/Economy	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 the T&T industry	
			Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Italy	29	4.76	24	4.55	39	4.53	1	7.00	31	4.30	134	3.40
Jamaica	64	3.76	63	3.22	45	4.28	59	4.41	92	2.62	95	4.29
Japan	24	4.86	25	4.53	7	6.20	53	4.56	7	5.50	130	3.52
Jordan	69	3.63	62	3.23	75	3.47	69	4.10	82	2.80	67	4.56
Kazakhstan	79	3.48	82	2.74	80	3.27	87	3.12	48	3.75	73	4.54
Kenya	105	2.98	77	2.83	86	3.23	104	2.37	106	2.18	91	4.31
Korea, Rep.	17	4.98	31	4.44	16	5.56	51	4.61	1	6.00	96	4.29
Kuwait	62	3.89	72	2.94	59	3.95	68	4.11	54	3.60	40	4.85
Kyrgyz Republic	131	2.61	128	2.01	132	2.55	138	1.27	89	2.65	70	4.56
Latvia	40	4.40	47	3.85	44	4.34	35	5.03	38	4.12	57	4.65
Lebanon	65	3.74	67	3.02	110	2.87	27	5.52	84	2.75	68	4.56
Lesotho	132	2.60	140	1.62	125	2.65	105	2.36	129	1.70	55	4.66
Lithuania	48	4.19	95	2.58	21	5.22	63	4.30	36	4.21	58	4.64
Luxembourg	20	4.96	41	4.11	14	5.78	43	4.82	5	5.64	83	4.42
Macedonia, FYR	74	3.58	122	2.19	84	3.24	64	4.27	60	3.41	46	4.79
Madagascar	119	2.73	111	2.31	133	2.46	100	2.54	132	1.66	54	4.66
Malawi	135	2.48	134	1.86	103	2.96	129	1.53	135	1.61	82	4.43
Malaysia	41	4.36	26	4.48	36	4.60	73	3.83	57	3.47	5	5.45
Mali	129	2.61	119	2.23	90	3.16	117	1.94	125	1.85	116	3.88
Malta	14	5.06	18	4.76	28	4.99	15	6.25	21	4.96	90	4.32
Mauritania	133	2.60	132	1.88	128	2.60	123	1.72	117	2.00	48	4.78
Mauritius	55	4.04	60	3.25	37	4.60	48	4.68	69	3.19	75	4.48
Mexico	61	3.92	49	3.75	69	3.64	61	4.37	78	2.93	33	4.92
Moldova	97	3.16	125	2.12	123	2.72	91	2.92	66	3.21	41	4.84
Mongolia	107	2.96	71	2.95	135	2.38	116	1.97	94	2.59	36	4.89
Montenegro	50	4.14	58	3.36	92	3.13	19	5.98	51	3.64	62	4.61
Morocco	73	3.60	64	3.10	70	3.63	74	3.78	79	2.89	63	4.61
Mozambique	120	2.72	114	2.25	134	2.42	106	2.34	133	1.65	30	4.95
Namibia	70	3.62	61	3.24	60	3.91	72	3.84	100	2.44	53	4.66
Nepal	128	2.64	121	2.23	137	2.28	130	1.51	127	1.79	6	5.40
Netherlands	15	5.01	13	5.16	4	6.31	58	4.45	12	5.39	122	3.73
New Zealand	12	5.06	12	5.23	46	4.27	11	6.34	22	4.95	74	4.51
Nicaragua	101	3.11	112	2.29	106	2.90	88	3.11	113	2.07	17	5.16
Nigeria	114	2.83	99	2.51	119	2.77	103	2.37	105	2.20	89	4.32
Norway	28	4.77	15	5.06	64	3.79	10	6.42	14	5.35	136	3.23
Oman	47	4.20	53	3.50	41	4.50	57	4.45	53	3.61	29	4.96
Pakistan	104	2.99	96	2.53	77	3.43	119	1.93	121	1.89	15	5.16
Panama	36	4.52	16	4.84	47	4.26	42	4.84	50	3.64	26	5.01
Paraguay	115	2.80	136	1.80	136	2.29	99	2.55	102	2.36	27	4.98
Peru	85	3.36	75	2.88	121	2.77	67	4.16	83	2.79	103	4.20
Philippines	89	3.33	69	2.96	89	3.17	92	2.90	96	2.52	24	5.08
Poland	58	3.94	86	2.69	66	3.69	46	4.71	41	3.98	61	4.61
Portugal	27	4.78	34	4.29	22	5.20	16	6.13	34	4.24	108	4.04
Puerto Rico	43	4.33	40	4.14	32	4.76	41	4.88	62	3.41	79	4.44
Qatar	31	4.70	23	4.60	35	4.67	37	5.01	32	4.30	31	4.95
Romania	68	3.67	93	2.59	109	2.87	34	5.07	59	3.42	84	4.41
Russian Federation	46	4.22	33	4.33	93	3.13	40	4.93	37	4.16	72	4.54
Rwanda	117	2.74	103	2.44	55	4.06	134	1.35	140	1.25	59	4.63
Saudi Arabia	38	4.43	42	4.03	43	4.38	47	4.71	45	3.84	14	5.18
Senegal	113	2.84	94	2.58	99	3.01	94	2.71	107	2.18	123	3.72
Serbia	81	3.40	110	2.33	117	2.79	56	4.47	49	3.64	119	3.77
Seychelles	42	4.35	27	4.47	31	4.81	29	5.24	58	3.47	120	3.76
Sierra Leone	138	2.36	137	1.78	124	2.68	140	1.06	136	1.49	47	4.79
Singapore	4	5.31	14	5.07	2	6.45	38	5.00	9	5.45	66	4.57
Slovak Republic	60	3.92	123	2.18	48	4.20	39	4.94	44	3.88	81	4.43
Slovenia	35	4.52	76	2.83	25	5.05	14	6.27	29	4.46	111	4.00
South Africa	59	3.93	43	3.97	63	3.79	54	4.53	81	2.82	71	4.55
Spain	5	5.30	10	5.29	10	5.87	5	6.71	28	4.53	106	4.11
Sri Lanka	86	3.35	88	2.66	29	4.91	108	2.28	116	2.01	34	4.91
Suriname	100	3.11	97	2.52	102	2.96	85	3.12	76	2.98	114	3.96

(Cont'd.)

Table B3: The Travel &amp; Tourism Competitiveness Index 2013: Business environment and infrastructure (cont'd.)

Country/Economy	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 the T&T industry	
			Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Swaziland	106	2.96	126	2.11	68	3.66	111	2.16	114	2.03	38	4.86
Sweden	23	4.89	19	4.70	17	5.54	36	5.01	3	5.66	129	3.53
Switzerland	1	5.42	9	5.36	3	6.40	5	6.71	6	5.57	139	3.03
Taiwan, China	34	4.63	51	3.67	18	5.54	75	3.77	16	5.10	21	5.09
Tajikistan	123	2.69	107	2.40	104	2.92	139	1.16	109	2.12	42	4.84
Tanzania	125	2.68	118	2.23	113	2.85	125	1.69	126	1.80	43	4.83
Thailand	44	4.25	21	4.62	62	3.81	31	5.17	90	2.63	25	5.03
Trinidad and Tobago	54	4.07	56	3.42	34	4.70	77	3.62	61	3.41	13	5.19
Turkey	52	4.08	29	4.47	52	4.08	45	4.76	71	3.10	112	3.98
Uganda	121	2.70	120	2.23	108	2.89	124	1.69	124	1.87	45	4.83
Ukraine	71	3.62	78	2.80	73	3.52	50	4.63	70	3.13	110	4.01
United Arab Emirates	9	5.14	3	6.06	26	5.02	24	5.69	39	4.02	35	4.90
United Kingdom	10	5.13	5	5.61	13	5.78	22	5.76	10	5.43	138	3.05
United States	2	5.36	2	6.16	27	5.00	13	6.27	17	5.08	94	4.29
Uruguay	78	3.53	87	2.67	74	3.52	79	3.44	46	3.77	98	4.25
Venezuela	99	3.12	92	2.61	139	2.21	78	3.44	72	3.07	97	4.25
Vietnam	94	3.26	79	2.78	98	3.03	112	2.15	68	3.19	18	5.15
Yemen	110	2.89	124	2.17	115	2.82	107	2.30	122	1.88	10	5.27
Zambia	122	2.69	108	2.38	88	3.17	122	1.73	119	1.94	100	4.23
Zimbabwe	116	2.76	127	2.06	95	3.11	118	1.93	108	2.13	65	4.58

Table B4: The Travel &amp; Tourism Competitiveness Index 2013: Human, cultural, and natural resources

Country/Economy	T&T HUMAN, CULTURAL AND NATURAL RESOURCES		PILLARS							
			11. Human resources		12. Affinity for Travel & Tourism		13. Natural resources		14. Cultural resources	
	Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Albania	63	3.96	43	5.10	4	5.89	109	2.85	87	2.00
Algeria	123	3.25	103	4.41	137	3.69	121	2.68	74	2.21
Argentina	41	4.38	57	4.95	107	4.28	20	5.02	44	3.26
Armenia	94	3.65	44	5.10	47	4.83	124	2.61	81	2.07
Australia	4	5.39	22	5.40	38	4.91	2	6.16	20	5.10
Austria	9	5.24	17	5.56	12	5.47	49	4.04	12	5.89
Azerbaijan	96	3.63	59	4.95	62	4.69	110	2.84	85	2.03
Bahrain	83	3.74	26	5.37	59	4.72	129	2.43	67	2.46
Bangladesh	124	3.24	108	4.28	130	3.96	90	3.23	116	1.49
Barbados	50	4.20	23	5.40	2	6.10	133	2.25	50	3.03
Belgium	18	4.90	19	5.54	31	5.07	103	3.00	9	5.99
Benin	126	3.20	113	4.11	88	4.48	112	2.81	124	1.40
Bolivia	85	3.73	101	4.52	139	3.24	27	4.80	72	2.37
Bosnia and Herzegovina	92	3.66	76	4.81	49	4.81	107	2.91	79	2.12
Botswana	112	3.43	128	3.57	105	4.30	39	4.26	109	1.61
Brazil	12	5.10	62	4.94	83	4.51	1	6.18	23	4.76
Brunei Darussalam	67	3.91	36	5.20	63	4.66	53	3.94	95	1.82
Bulgaria	53	4.10	69	4.89	67	4.62	76	3.41	40	3.47
Burkina Faso	129	3.16	129	3.55	94	4.38	81	3.36	126	1.36
Burundi	138	2.73	137	3.23	126	4.09	127	2.56	140	1.03
Cambodia	78	3.77	99	4.57	20	5.28	67	3.63	111	1.58
Cameroon	102	3.56	112	4.23	103	4.32	32	4.53	136	1.15
Canada	5	5.39	5	5.77	34	5.00	10	5.33	16	5.47
Cape Verde	107	3.45	75	4.81	14	5.43	138	1.85	102	1.72
Chad	136	2.82	135	3.29	134	3.82	95	3.16	139	1.03
Chile	65	3.94	39	5.15	89	4.46	93	3.20	53	2.94
China	13	5.09	38	5.18	129	4.04	5	5.59	15	5.53
Colombia	34	4.51	72	4.88	86	4.49	16	5.14	37	3.52
Costa Rica	38	4.45	27	5.36	28	5.12	7	5.44	93	1.87
Côte d'Ivoire	114	3.41	124	3.74	93	4.41	41	4.15	129	1.34
Croatia	42	4.37	93	4.63	29	5.12	56	3.85	32	3.87
Cyprus	46	4.27	24	5.39	10	5.50	96	3.14	48	3.07
Czech Republic	28	4.61	48	5.04	70	4.60	77	3.40	17	5.39
Denmark	26	4.64	10	5.71	79	4.53	72	3.46	22	4.86
Dominican Republic	108	3.45	85	4.72	36	4.95	130	2.40	100	1.74
Ecuador	56	4.05	88	4.68	123	4.09	13	5.26	76	2.16
Egypt	84	3.74	105	4.41	60	4.70	87	3.27	61	2.58
El Salvador	125	3.24	95	4.60	90	4.44	132	2.38	113	1.52
Estonia	51	4.19	37	5.20	23	5.22	57	3.81	63	2.54
Ethiopia	97	3.61	126	3.71	120	4.16	33	4.52	82	2.06
Finland	24	4.65	4	5.80	64	4.65	54	3.88	26	4.28
France	11	5.20	35	5.22	48	4.82	30	4.71	8	6.04
Gambia, The	111	3.43	111	4.25	21	5.23	114	2.78	121	1.47
Georgia	91	3.67	40	5.12	53	4.79	119	2.70	84	2.05
Germany	7	5.31	18	5.54	61	4.69	31	4.66	4	6.34
Ghana	117	3.35	109	4.27	110	4.26	82	3.35	114	1.51
Greece	30	4.58	50	5.02	55	4.79	40	4.24	25	4.28
Guatemala	69	3.88	86	4.72	57	4.74	47	4.07	88	2.00
Guinea	134	3.03	120	3.82	119	4.16	105	2.92	133	1.21
Guyana	106	3.47	73	4.87	75	4.58	97	3.11	132	1.31
Haiti	140	2.44	136	3.27	135	3.80	140	1.49	134	1.21
Honduras	89	3.69	98	4.58	85	4.50	48	4.05	106	1.64
Hong Kong SAR	29	4.59	8	5.74	3	6.01	84	3.33	42	3.30
Hungary	54	4.08	42	5.11	102	4.32	111	2.81	30	4.09
Iceland	36	4.47	3	5.84	11	5.50	63	3.72	57	2.83
India	21	4.72	96	4.60	111	4.25	9	5.36	24	4.68
Indonesia	31	4.56	61	4.94	114	4.23	6	5.57	38	3.51
Iran, Islamic Rep.	74	3.85	87	4.71	128	4.04	74	3.44	45	3.20
Ireland	40	4.41	11	5.67	26	5.16	117	2.71	29	4.09
Israel	71	3.86	31	5.29	87	4.48	98	3.09	60	2.60

(Cont'd.)

Table B4: The Travel &amp; Tourism Competitiveness Index 2013: Human, cultural, and natural resources (cont'd.)

Country/Economy	T&T HUMAN, CULTURAL AND NATURAL RESOURCES		PILLARS							
			11. Human resources		12. Affinity for Travel & Tourism		13. Natural resources		14. Cultural resources	
	Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Italy	14	5.05	41	5.12	72	4.59	34	4.43	7	6.06
Jamaica	87	3.72	84	4.73	27	5.15	80	3.37	108	1.62
Japan	10	5.22	21	5.42	77	4.55	21	4.99	11	5.90
Jordan	72	3.86	67	4.93	13	5.46	94	3.19	94	1.86
Kazakhstan	119	3.30	71	4.88	121	4.13	120	2.69	117	1.49
Kenya	60	4.01	106	4.29	58	4.73	14	5.26	97	1.75
Korea, Rep.	20	4.74	33	5.25	81	4.52	89	3.24	10	5.97
Kuwait	131	3.14	66	4.93	132	3.92	139	1.81	90	1.89
Kyrgyz Republic	103	3.51	97	4.60	19	5.29	122	2.67	119	1.48
Latvia	77	3.81	46	5.05	113	4.24	70	3.59	73	2.36
Lebanon	70	3.87	64	4.94	1	6.12	136	1.95	68	2.45
Lesotho	139	2.62	140	2.85	74	4.59	137	1.90	137	1.13
Lithuania	61	3.98	63	4.94	78	4.54	73	3.44	51	3.01
Luxembourg	39	4.42	20	5.53	15	5.41	55	3.85	55	2.90
Macedonia, FYR	100	3.58	81	4.76	73	4.59	113	2.80	75	2.16
Madagascar	127	3.20	118	3.95	91	4.44	99	3.08	131	1.33
Malawi	113	3.43	123	3.75	118	4.16	36	4.36	123	1.43
Malaysia	17	4.93	28	5.35	16	5.39	18	5.08	31	3.89
Mali	121	3.28	131	3.51	71	4.60	123	2.61	70	2.39
Malta	49	4.22	29	5.35	9	5.66	115	2.77	47	3.10
Mauritania	132	3.07	127	3.61	109	4.27	106	2.92	115	1.49
Mauritius	93	3.65	49	5.03	6	5.75	134	2.23	110	1.60
Mexico	15	5.02	53	5.00	65	4.62	8	5.38	21	5.08
Moldova	133	3.04	102	4.51	112	4.25	135	2.01	125	1.39
Mongolia	90	3.69	91	4.66	100	4.33	85	3.29	66	2.47
Montenegro	47	4.26	51	5.01	7	5.66	62	3.73	59	2.65
Morocco	68	3.89	90	4.67	22	5.23	126	2.60	49	3.06
Mozambique	130	3.15	138	3.20	116	4.22	64	3.71	120	1.48
Namibia	115	3.38	130	3.52	84	4.51	43	4.13	127	1.35
Nepal	105	3.48	125	3.74	92	4.43	35	4.38	128	1.34
Netherlands	16	4.97	9	5.73	52	4.80	60	3.74	14	5.60
New Zealand	22	4.69	13	5.62	17	5.38	26	4.80	52	2.96
Nicaragua	82	3.74	89	4.68	68	4.61	52	3.95	101	1.74
Nigeria	118	3.33	122	3.78	117	4.16	68	3.62	98	1.75
Norway	33	4.53	16	5.56	66	4.62	59	3.81	27	4.14
Oman	76	3.84	54	4.98	43	4.85	79	3.38	78	2.16
Pakistan	116	3.38	115	4.09	136	3.76	86	3.27	71	2.38
Panama	45	4.29	79	4.78	41	4.89	11	5.32	77	2.16
Paraguay	120	3.29	104	4.41	124	4.09	100	3.04	107	1.63
Peru	37	4.47	80	4.78	82	4.51	12	5.29	43	3.30
Philippines	64	3.95	82	4.73	42	4.89	44	4.12	83	2.05
Poland	32	4.56	45	5.09	125	4.09	66	3.70	18	5.35
Portugal	19	4.84	32	5.27	32	5.03	83	3.35	13	5.71
Puerto Rico	81	3.75	47	5.05	30	5.08	104	2.98	92	1.88
Qatar	75	3.85	7	5.74	76	4.57	128	2.52	62	2.54
Romania	73	3.85	83	4.73	122	4.11	88	3.25	41	3.31
Russian Federation	58	4.02	92	4.64	138	3.66	37	4.31	39	3.49
Rwanda	104	3.49	110	4.26	40	4.89	61	3.73	138	1.07
Saudi Arabia	80	3.76	30	5.31	98	4.35	69	3.59	96	1.76
Senegal	88	3.71	117	4.00	56	4.76	46	4.07	89	1.99
Serbia	109	3.45	94	4.63	104	4.30	131	2.39	65	2.48
Seychelles	48	4.26	56	4.96	5	5.86	65	3.71	64	2.50
Sierra Leone	137	2.81	133	3.35	131	3.96	116	2.76	135	1.19
Singapore	25	4.64	2	6.05	8	5.66	92	3.21	35	3.63
Slovak Republic	55	4.06	52	5.01	96	4.36	51	3.98	54	2.90
Slovenia	52	4.11	55	4.96	50	4.80	58	3.81	56	2.85
South Africa	57	4.03	132	3.45	44	4.85	17	5.13	58	2.70
Spain	6	5.36	34	5.24	39	4.90	29	4.75	1	6.57
Sri Lanka	66	3.93	78	4.78	51	4.80	42	4.15	86	2.00
Suriname	86	3.72	100	4.52	115	4.22	38	4.26	91	1.88

Table B4: The Travel & Tourism Competitiveness Index 2013: Human, cultural, and natural resources (*cont'd.*)

Country/Economy	T&T HUMAN, CULTURAL AND NATURAL RESOURCES		PILLARS							
			11. Human resources		12. Affinity for Travel & Tourism		13. Natural resources		14. Cultural resources	
	Rank	Score	Rank	Score	Rank	Score	Rank	Score	Rank	Score
Swaziland	135	2.94	139	2.94	95	4.38	118	2.71	99	1.74
Sweden	8	5.30	12	5.65	33	5.00	45	4.10	2	6.44
Switzerland	2	5.63	1	6.11	25	5.21	19	5.03	6	6.16
Taiwan, China	44	4.29	25	5.38	37	4.94	91	3.22	34	3.64
Tajikistan	122	3.26	60	4.95	127	4.06	125	2.61	122	1.43
Tanzania	59	4.02	116	4.01	80	4.53	4	5.86	104	1.66
Thailand	23	4.68	70	4.89	18	5.37	23	4.86	36	3.60
Trinidad and Tobago	95	3.64	74	4.84	133	3.87	75	3.44	69	2.42
Turkey	27	4.63	68	4.92	35	4.96	78	3.39	19	5.23
Uganda	79	3.76	114	4.10	54	4.79	25	4.82	130	1.33
Ukraine	99	3.59	65	4.93	101	4.33	102	3.03	80	2.08
United Arab Emirates	35	4.51	15	5.61	24	5.22	71	3.46	33	3.74
United Kingdom	3	5.57	6	5.76	45	4.85	15	5.24	3	6.44
United States	1	5.65	14	5.61	69	4.60	3	6.09	5	6.30
Uruguay	62	3.97	58	4.95	46	4.85	108	2.91	46	3.19
Venezuela	110	3.45	107	4.29	140	2.98	24	4.83	103	1.68
Vietnam	43	4.30	77	4.80	108	4.27	50	3.99	28	4.13
Yemen	128	3.18	119	3.87	106	4.28	101	3.03	112	1.54
Zambia	98	3.60	121	3.79	97	4.36	28	4.76	118	1.49
Zimbabwe	101	3.56	134	3.32	99	4.34	22	4.91	105	1.66





# How to Succeed as a Tourism Destination in a Volatile World

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After the financial crisis of 2007–08, the global economy faced its deepest setback in decades. Although economies have recovered, volatility has remained a key risk to further development—financially, economically, politically, and environmentally. Sovereign debt crunches get worse, political instability is growing in the world's hot zones, and environmental disasters tend to grow more severe in their short-term impacts.

In addition, other forces—less dramatic but no less powerful—continue to reshape the world's future. The ongoing digitization of daily life has sped up the dissemination of news; as a result, consumers are developing more flexible buying decisions and conventional ways of doing business are being fundamentally challenged. Established economies are increasingly feeling the impact of aging populations through the growing pressure on social care systems and the changing requirements needed to meet the mobility, housing, and leisure habits of older people. At the same time, new demand is unfolding in developing regions such as the BRIC countries (Brazil, Russia, India, and China) and beyond, changing the profile of the international traveler. All these changes will have significant impacts on tourism destinations (Figure 1).

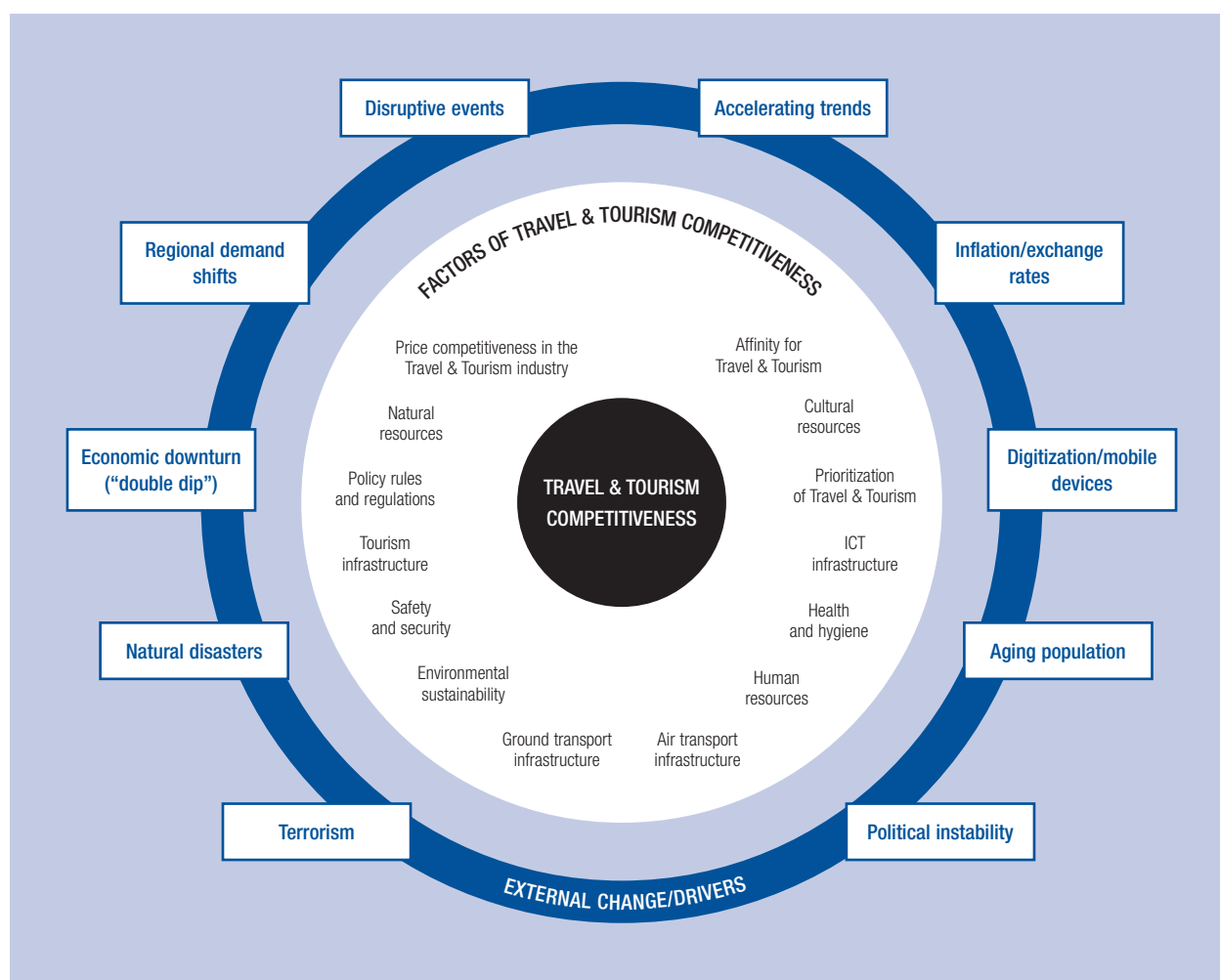
Policymakers responsible for developing and growing their nations as successful tourism destinations face a large variety of change drivers in their home countries and in key tourism source markets. They will need progressively more and more sophisticated methods to nurture the development of the tourism sector successfully by increasing inbound tourism. In a world that is ever more volatile and an environment that is ever changing, new capabilities in tourism management and sector development are vital if an economy is to become more resilient against disruptive events and to prepare for long-term stability.

Long-established destination-management techniques such as advertising campaigns or the presence of industry fairs are increasingly being displaced. Communicating with travelers online through various direct or indirect channels requires many destination managers and developers to redesign their existing marketing capabilities.

At the same time, destinations need to rethink their positioning among competing countries to prepare for short-term demand shocks and long-term shifts of traveler flows. In the past, a narrow focus on attracting the maximum number of budget tourists in markets such as those of Bulgaria, Egypt, and Spain drove strong growth. However, this focus brings extensive risks, including break-neck competition, environmental exploitation, and unhealthy investment bubbles.

Moreover, investment in infrastructure faces new obstacles. Ecological, regulatory, fiscal, and sociopolitical constraints often hinder ambitious expansion. Large-scale projects are increasingly complex and difficult

Figure 1: Travel &amp; Tourism competitiveness enablers and change drivers



Source: Booz &amp; Company.

to manage. Examples of such large projects that have proven unwieldy are recent European rail and airport projects such as the Berlin airport, which has had multiple problems and delays.

Many destinations are still catering their touristic offerings to very few, mature source markets—and such destinations risk losing touch with tourists from emerging source regions such as Asia, Russia, or Latin America, whose needs differ significantly from those of the typical Western traveler. For example, introducing sophisticated methods of demand segmentation and profiling to attract the growing number of Chinese travelers will become increasingly important.

All these challenges have affected Travel & Tourism (T&T) in recent years, but they have not stopped the overall dynamic in the sector, which is driven by desire to travel abroad, visit foreign places, or just relax. Travel & Tourism remains a strong engine of growth, representing nearly 10 percent of global economic activity if all adjacent services are taken into account. Instability is a new reality that carries opportunities as well as risk. This is why tourism destinations, policymakers, and

private-sector stakeholders need to act decisively to develop the right capabilities to succeed going forward.

### SEPARATING DIFFERENTIATORS FROM ENABLERS

The Travel & Tourism Competitiveness Index (TTCI) described in Chapter 1.1 measures a variety of criteria that enable the competitiveness of economies in driving inbound tourism growth—including natural scenery; proper, well-maintained infrastructure; and sound, open-market policies. Some factors qualify a country only to compete for tourists, while others create true differentiation among potential destinations to achieve long-term attractiveness for foreign visitors.

The building blocks of any tourism destination are assets such as natural scenery and cultural heritage as well as properly functioning infrastructure that allows travelers to access a country and move comfortably within it. Without these building blocks, a country cannot compete in the global tourism market. However, these assets require significant investment in terms of conservation (in the case of natural treasures) and maintenance (in the case of physical infrastructure,

which tends to lose value over time). Policymakers need to develop long-term plans in order to best cater for inbound tourism flows. But these efforts alone do not generate true differentiation from other countries that are doing exactly the same thing. To build advantage over competing countries, policymakers and destination managers need to identify and leverage capabilities that make their destination distinctive.

This chapter examines the connection between T&T competitiveness (as measured by the TTCl) and a score on how dynamic and stable inbound tourism has developed in a given country (Travel & Tourism Stable Growth Performance Score—see Box 1) over the past five years.

An examination of the 20 highest- and lowest-ranked economies in the TTCl shows which pillars of tourism competitiveness have proven to be most effective in driving stable inbound tourism growth (Figure 2). For example, a high score in the TTCl indicator *Affinity for Travel & Tourism* also means a high score in stable growth performance of tourism development in recent years. These factors are true differentiators that create a strong stable growth record in the inbound tourism industry.

The results reinforce the idea that policymakers have the means to steer their tourism destination toward resilience against short-term shocks and prepare for long-term stability by focusing on certain areas where leading countries stand out over their underperforming peers. Best-practice policies and sector-development strategies from highly competitive tourism destinations have proven successful in weathering the economic downturn and preparing for more volatility going forward. Each country should identify its specific key areas of tourism opportunities and align its policy focus around these core capabilities. These differentiators are diverse—reflecting a mixture of international travel needs and experiences—and range from reestablishing the trust of visitors after periods of instability and maintaining price competitiveness in uncertain market surroundings to making sustainability a winning factor and turning an affinity for tourism into successful destination development.

We have identified the 5 (out of 14) pillars from the TTCl that are correlated most closely with our Stable Growth Performance Score (Figure 3); in the remainder of this section we describe them in greater detail.

Building on their existing *Affinity for Travel & Tourism*, policymakers should aim to generate a positive climate for tourism and tie tourism businesses closely to the overall economy—apart from large-scale investments or infrastructure expansion. Going forward, fully supporting local communities, small businesses, and individual entrepreneurs will be key to converting openness to foreign visitors into developing touristic services that collectively make a destination distinctive.

### Box 1: The Travel & Tourism Stable Growth Performance Score

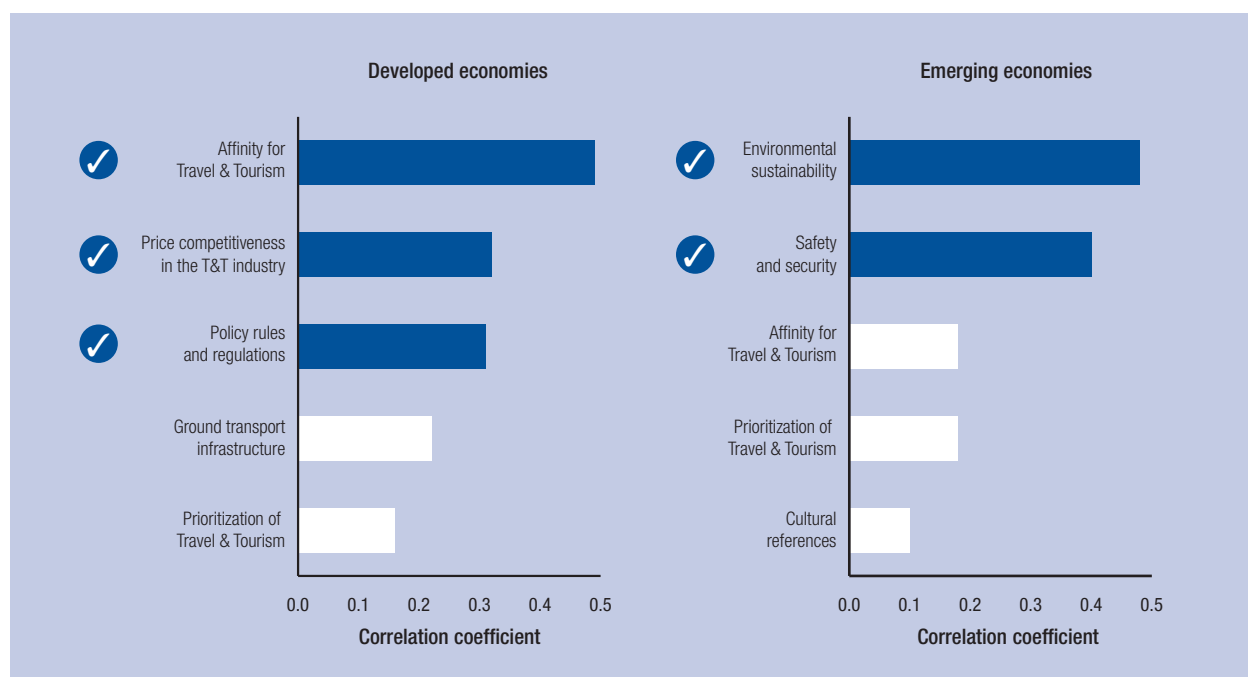
Booz & Company has calculated a Travel & Tourism Stable Growth Performance Score based on international tourist arrivals data from the World Tourism Organization in a sample group of 74 most-visited countries in 2011 as the foremost measure of inbound tourism performance. We define *stable growth performance* as the simple average of inbound tourism growth (the compound annual growth rate in the period of 2007–11) and the volatility of growth (the standard deviation of annual growth rates in the same period) per economy. Economies with high growth rates and low volatility rates score high, and vice versa. To differentiate competitiveness enablers for destinations with developed and developing tourism, we have focused on the 20 highest- and lowest-ranked economies in the Travel & Tourism Competitiveness Index (TTCl) based on the 2008, 2009, 2011, and 2013 editions. For each of these two groups, we have calculated the correlation factor of their TTCl pillar scores with our Stable Growth Performance Score.

In addition, encouraging tourists to return requires a holistic view of the traveler lifecycle rather than one-size-fits-all campaigning. Australia, for instance, connects young people to its country by offering “work & travel” opportunities through various local businesses; as these travelers mature and have more money to spend, they want to return.

Policymakers need to strengthen their core area of competence—*Policy rules and regulations*—with a clear focus on long-term approaches to tourism development combined with agility in reacting to short-term changes. To realize the full potential of the tourism sector, it will be critical to lower existing entry barriers in terms of infrastructure or visa regulations, drive private-sector investment through further liberalization, and empower local communities to participate in the tourism value chain, as well as establish cross-border cooperation with other destinations. For instance, Ireland has launched a national program called “The Gathering Ireland” through which businesses, sport clubs, cultural establishments, and local authorities are asked to showcase ideas on how best to attract travelers to the country—with the ultimate goal of promoting an economic revival after the crisis with tourism as one of its cornerstones.

*Price competitiveness* will certainly remain a key differentiator across a variety of dimensions. On the macro level, exchange rate fluctuations will continue to be a major and unpredictable factor that influences travel behavior. These fluctuations will have a particularly severe impact on destinations that focus on “budget travelers” who are less loyal to specific destinations than they are keen on finding inexpensive traveling opportunities. Today, tourists enjoy near-perfect

Figure 2: Top five T&amp;T competitiveness enablers by impact on stable growth, developed and emerging economies



Sources: UNWTO 2012; World Economic Forum various years; Booz & Company analysis.

Note: The data show the correlation of factors of the Travel & Tourism Stable Growth Performance Score and the Travel & Tourism Competitiveness Index (TTCI) score. Only the highest correlation results are shown for the 20 highest- and lowest-ranking economies according to the TTCI. Check marks indicate those categories we consider to be differentiating in terms of T&T competitiveness and growth.

price-versus-quality transparency through user-generated online reviews. Tourism planners need to make pricing for inbound tourism more flexible and should ease access to a country by tax reduction if and when needed. They should also support local investment and entrepreneurship with financial incentives such as investment aid or other support measures. Destinations and private businesses need to respond both to bargain seekers and to increasing demand for more sophisticated travel experiences in order to best leverage their touristic assets. Turkey, for example, has excelled in establishing itself as a mainstream destination for many Europeans (especially travelers from the United Kingdom but also those from Russia); at the same time, it has diversified its touristic offerings, leveraging its diverse culture, history, and natural scenery.

Finally, developing and fostering more varied forms of travel can transform *Environmental sustainability* from a regulatory burden to a true differentiator for tourism source markets. Policymakers, especially those in developing tourism destinations, should prioritize long-term sustainability to safeguard their natural and cultural assets because “green consumerism” has become a significant buying power in developed markets. Key emerging tourist groups, including the well-traveled retiring baby boomers, are demanding green travel offerings instead of traditional sun-and-beach vacations. A clear focus on greening the supply side of tourism as well as environmental conservation efforts on a national level will generate clear advantages over

competing destinations. Policymakers need to be able to consistently match long-term tourism master planning, short-term interests of multiple stakeholders, and external influences such as macroeconomic events or tourist demand changes to make tourism sustainable—economically and environmentally. To succeed, policymakers will need to manage the bottleneck of natural assets carefully to put economic yield and ecological footprint into a steady, stable state. In Kenya, the Seychelles, and Tanzania, for example, ecotourism has gained traction in recent years, growing from a niche segment to a high-yield volume market. These countries preserve their natural assets for responsible tourism, which drives economic growth on both the national and local level.

It goes without saying that *Safety and security* is clearly linked to inbound tourism well-being just to “stay in the game.” This is especially important in developing regions that suffer from political instability or governmental inefficiencies, which can often result in high crime rates and stunted economic development. The recent Arab Spring movement led to severe drops in visitors to tourism-focused economies, particularly in Egypt and Tunisia; by contrast, Morocco has weathered the crisis considerably well, with only minor drops in inbound tourism, by quickly introducing political reform instead of confrontation and by continuing to focus on its long-term tourism development strategy. However, the battle against crime on various levels—whether in the form of street crime that is evident in deteriorating

Figure 3: Key capabilities that drive T&amp;T stable growth performance

DIFFERENTIATOR	BEST-PRACTICE CAPABILITIES
✓ Affinity for Travel & Tourism	<ul style="list-style-type: none"> <li>• Customer orientation</li> <li>• Openness to foreign visitors</li> <li>• Local stakeholder involvement</li> </ul>
✓ Policy rules and regulations	<ul style="list-style-type: none"> <li>• Low entry barriers</li> <li>• Sector liberalization</li> <li>• Private/public sector cooperation</li> </ul>
✓ Price competitiveness in the T&T industry	<ul style="list-style-type: none"> <li>• Affordable touristic offerings &amp; hotels</li> <li>• Taxation levels</li> <li>• Purchasing power/exchange rates</li> </ul>
✓ Environmental sustainability	<ul style="list-style-type: none"> <li>• Sustainability policies and regulations</li> <li>• Private-sector innovations</li> <li>• Nature conservation</li> </ul>
✓ Safety and security	<ul style="list-style-type: none"> <li>• Protection of touristic areas/facilities</li> <li>• Reliability of authorities</li> <li>• Trust-building campaigns</li> </ul>

Source: World Economic Forum; Booz & Company.

security for travelers or corruption that affects businesses—will remain an ongoing challenge for many developing destinations in their pursuit of unhampered destination development.

## CONCLUSION

To prevail under more volatile market conditions and continue benefitting from a vibrant tourism sector, policymakers should identify and focus on their country's key competitive advantages over other countries and differentiate the traveler's experience in their country from the experience to be had elsewhere. At the same time, they should monitor the shifting trends in international customer origins and profiles. It is important to examine existing destination marketing and tourism development planning in the context of the challenges of a more volatile macroeconomic environment. Established destinations need to pool their efforts on innovations, multi-stakeholder cooperation, and flexibility if they are to respond successfully to demand from emerging regions. Developing destinations should consider effective short-term turnaround strategies to strengthen their T&T sectors and reestablish their attraction for the international traveler by focusing on long-term sector development and making sustainability a core of destination development and marketing.

Despite increasing instability induced by economic, political, and environmental challenges, tourism is expected to remain a significant driver of future economic growth. Policymakers who concentrate on

their countries' most prominent assets and are able to leverage them most effectively are best positioned to turn volatility risks into opportunities for long-term stability.

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# Visa Facilitation: Stimulating Economic Growth and Development through Tourism

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Over the past six decades, tourism has continued to expand and diversify; it is now one of the largest and fastest-growing economic sectors in the world. Many new tourist destinations have emerged alongside the traditional ones of Europe and North America. From 1980 to 2011, international tourist arrivals (i.e., overnight visitors) more than tripled worldwide, leaping from 279 million in 1980 to 996 million in 2011, corresponding to an average growth of 4.2 percent a year.

## THE DIMENSIONS OF INTERNATIONAL TOURISM

In the same period, the export value of tourism—international tourism receipts, including international passenger transport—increased from US\$125 billion in 1980 to US\$1,240 billion in 2011. In real terms, this corresponds to an average growth of 4.1 percent a year, which is virtually the same pace as tourist arrivals.

According to the World Tourism Organization (UNWTO)'s long-term forecast *Tourism Towards 2030*,<sup>1</sup> international tourist arrivals are expected to continue to grow at the sustained pace of 3.3 percent a year on average, reaching 1.8 billion by 2030. International tourist arrivals in the emerging-economy destinations of Asia, Latin America, Central and Eastern Europe, Eastern Mediterranean Europe, the Middle East, and Africa will grow at double the pace (4.4 percent a year) of advanced-economy destinations (2.2 percent a year). As a result, arrivals in emerging economies are expected to surpass those in advanced economies by 2015. In 2030, 57 percent of international tourist arrivals will occur in emerging-economy destinations (versus 30 percent in 1980 and 47 percent in 2010). Arrivals in advanced-economy destinations will make up 43 percent of arrivals overall (versus 70 percent in 1980 and 53 percent in 2010).

In order to fully reap the benefits that international tourism can bring to an economy, it is necessary to put in place conditions that make the country easy to visit as well as attractive to develop, and to facilitate investment in its Travel & Tourism (T&T) sector.

## THE FUNCTIONS OF VISAS

Visa policies are among the most important governmental formalities influencing international tourism. The development of policies and procedures for visas, as well as for other important travel documents such as passports, is closely linked to the development of tourism. With the swift growth of international tourism in the last six decades, the quality, reliability, and functionality of visa and other travel documents has evolved. Only half a century ago, travel was heavily impacted by customs regulations, currency exchange limitations, and visa formalities. A great deal of progress has been made in their facilitation, which has contributed to the remarkable growth of the tourism sector. The multilateral agreements that mutually exempt all or

certain categories of travelers from the visa requirement are particularly noteworthy. However, despite the progress made, current visa policies are still regularly mentioned as inadequate and inefficient, and are thus acknowledged to be an obstacle to tourism growth.

Visas perform several functions. They serve to ensure security; to control immigration and limit the entry, duration of stay, or activities of travelers; to generate revenue and apply measures of reciprocity; and to ensure a destination's carrying capacity and control tourism demand. Although "security" is commonly cited as the most important reason to impose a visa requirement, in practice, all the functions noted above are used as rationales to introduce or maintain a visa.

Travelers see visas mainly as a formality that imposes a cost. If the cost of obtaining a visa—either the direct monetary cost imposed in the form of fees or the indirect costs, which can include distance, time spent waiting in lines, and the complexity of the process—exceeds a threshold, potential travelers are simply deterred from making a particular journey or choose an alternative destination with less hassle. This finding is not new. It is interesting in this context to note that, in 1963, the delegates of 87 states agreed, at the United Nations Conference on International Travel & Tourism in Rome, that "Governments should extend to the maximum number of countries the practice of abolishing, through bilateral agreements or by unilateral decision, the requirement of entry Visas for temporary visitors."<sup>2</sup>

### VISA FACILITATION: AREAS OF OPPORTUNITY

Joint research by the UNWTO and the World Travel & Tourism Council (WTTC), presented to the 4th T20 Ministers' Meeting in May 2012,<sup>3</sup> demonstrates that improving visa processes could generate an additional US\$206 billion in tourism receipts and create as many as 5.1 million jobs by 2015 in the G-20 economies.<sup>4</sup>

The analysis also identified five important areas of opportunity for entry visa facilitation: delivery of information, current processes, differentiated treatment, the use of eVisa programs, and regional agreements. These are detailed below.

#### Improve the delivery of information

The availability and reliability of the information on entry formalities—especially visa requirements and procedures—that destinations provide were among the simplest, but also least addressed, areas of opportunity. This information—especially the elements of entry formalities of importance to the traveler—should also be available in multiple languages.

#### Facilitate current processes needed to obtain visas

A major opportunity for improvement is the way visa requests for temporary visitors are processed in general, as well as the requirements linked to this process.

Whether these requirements are personal interviews, official documents, or certificates, they usually produce at least temporary bottlenecks as well as uncertainty and longer wait times. Among the techniques suitable for improving these processes are the better use of modern information technology by service providers and the consideration of visas on arrival.

#### Differentiate treatment to facilitate tourist travel

The technique of facilitating the visa process for certain types of visitors is widely used among economies, especially for temporary visitors who are visiting for tourism purposes. The form this facilitation takes can range from easing restrictions depending on the means of transportation—for example, cruise passengers can be allowed to disembark from the ship without a tourist visa or to arrive by charter planes—to special treatment for specified geographical areas or ports of entry.

#### Institute eVisa programs

Currently, the most widely discussed opportunity is the use of eVisa. If an entry visa cannot be avoided, eVisa is the option preferred over the traditional, paper visa. It can be more easily obtained and requires neither the physical presence of the applicant nor the presence of the passport. These considerations are especially important for destinations without a widespread network of embassies and consulates.

#### Establish regional agreements

There are already a number of regional agreements in place that allow travelers from a third country to move freely between member countries once admitted by one of the participating countries. For citizens of one of the member states of some regions, such as the Schengen area in Europe, it is even possible to travel without a passport by simply using a valid national document of identification.

### GLOBAL AND REGIONAL DIMENSIONS TO VISAS

As a result of this work by the UNWTO and WTTC, at its June 2012 Summit, the G-20 leaders recognized the role of tourism as "a vehicle for job creation, economic growth and development";<sup>5</sup> furthermore, they committed to "work towards developing travel facilitation initiatives in support of job creation, quality work, poverty reduction and global growth."<sup>6</sup>

In spite of many recent strides taken, visa requirements still affect global tourism significantly. In 2012, destinations around the world requested, on average, that 63 percent of the world's population obtain a visa before initiating their international journey. Another 2 percent of the population were at least allowed to apply for an eVisa,<sup>7</sup> while 16 percent would be able to apply for a visa on arrival. Only 18 percent of the world's

**Table 1: Destination subregions by visa policies, percentage of world population affected (2012)**

Region	Openness score <sup>a</sup>	World population affected by visa policies (%)			
		No visa	Visa on arrival	eVisa	Visa required <sup>b</sup>
<b>World</b>	<b>31</b>	<b>18</b>	<b>16</b>	<b>2</b>	<b>63</b>
Advanced economies <sup>c</sup>	26	24	0.4	2	73
Emerging economies <sup>c</sup>	32	17	21	2	61
<b>UNWTO regions</b>					
<i>Africa</i>	29	8	<b>29</b>	0	62
North Africa	16	15	1	0	<b>84</b>
West Africa	23	7	<b>22</b>	0	<b>71</b>
Central Africa	6	2	7	0	<b>92</b>
East Africa	<b>49</b>	6	<b>62</b>	0	33
Southern Africa	29	<b>29</b>	0	0	<b>71</b>
<i>Americas</i>	<b>37</b>	<b>31</b>	8	1	60
North America	14	11	0	5	<b>84</b>
Caribbean	<b>45</b>	<b>39</b>	8	0	53
Central America	<b>37</b>	<b>30</b>	10	0	60
South America	35	<b>29</b>	9	0	62
<i>Asia and the Pacific</i>	<b>37</b>	20	19	7	54
Northeast Asia	27	<b>25</b>	2	0	<b>73</b>
Southeast Asia	<b>51</b>	23	<b>35</b>	<b>8</b>	35
Oceania	<b>41</b>	<b>27</b>	16	6	51
South Asia	24	4	20	<b>11</b>	65
<i>Europe</i>	26	21	6	0	<b>72</b>
Northern Europe	26	<b>26</b>	0	0	<b>74</b>
Western Europe	23	23	0	0	<b>77</b>
Central/Eastern Europe	26	16	14	0	<b>70</b>
Southern/Mediterranean Europe	27	<b>26</b>	1	0	<b>73</b>
EU-27 <sup>d</sup>	24	<b>24</b>	0	0	<b>76</b>
<i>Middle East</i>	20	1	20	<b>10</b>	<b>70</b>

Source: Data compiled by the UNWTO, based on information of national official institutions.

<sup>a</sup> Scores range from 100 to 0; the higher the score, the better. *Openness* indicates to what extent a destination is facilitating tourism. It is calculated by summing the percentage of the world population exempt from obtaining a visa with the percentages of visa on arrival weighted by 0.7 and eVisa by 0.5. For the (sub)regional totals, the percentages of the four different visa categories and the resulting openness score represent the averages of economies in that group (where destination economies are weighted by the natural logarithm of the population size— i.e., ln (1,000 population)—in order to take into account differences in destination size).

<sup>b</sup> *Visa required* means that a visa has to be obtained prior to departure and is not an electronic visa (eVisa).

<sup>c</sup> *Advanced economies* and *emerging economies* classifications are based on the International Monetary Fund (IMF); see the Statistical Annex of the IMF's World Economic Outlook of April 2012, p. 177, at [www.imf.org/external/pubs/ft/weo/2012/01](http://www.imf.org/external/pubs/ft/weo/2012/01).

<sup>d</sup> The EU-27 countries are Austria, Belgium, Bulgaria, Cyprus, Czech Rep., Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Italy, Latvia, Lithuania, Luxemburg, Malta, the Netherlands, Poland, Portugal, Ireland, Romania, the Slovak Republic, Slovenia, Spain, Sweden; and the United Kingdom.

Due to rounding, the sum of the separate figures may not be 100 percent.

Values in blue indicate 5 percentage points above world average; values in gray indicate 5 percentage points below world average.

population would not require a visa at all when traveling for tourism purposes (Table 1).

Emerging economies are, overall, more open in terms of travel requirements than advanced ones (Table 2).<sup>8</sup> When traveling to an emerging-economy destination, on average, 61 percent of the world's population need a traditional visa and 2 percent an eVisa; for advanced-economy destinations, 73 percent need a traditional visa and 2 percent an eVisa. However, full exemption from a visa is more common in advanced economies (24 percent versus 17 percent), whereas in

emerging economies obtaining a visa on arrival is much more common (21 percent versus 0.4 percent).

From a regional perspective, destinations in Asia and the Pacific have facilitated international travel the most. To visit these regions, 20 percent of the world's population do not require a visa, 19 percent could obtain a visa on arrival, and 7 percent could use an eVisa. Southeast Asia is the most open subregion because of the large number of visa-on-arrival requirements (this is sufficient for 35 percent of the world's population, on average) and the considerable number of visa

**Table 2: Top 25 least-restrictive destinations, 2012**

Rank	Destination	Openness score <sup>a</sup>
1	Cook Islands	100
	Dominica	100
	Micronesia	100
	Niue	100
	Tuvalu	100
6	Haiti	99
7	Macao SAR	84
8	Hong Kong SAR	80
9	Nicaragua	79
	Turks & Caicos Islands	79
	Fiji	79
12	Georgia	78
13	Guyana	76
	St Vincent & Grenadines	76
15	Vanuatu	75
16	Kyrgyzstan	74
	Gambia	74
	Vietnam	74
19	Rwanda	73
20	Mali	72
21	Cape Verde	71
	Nepal	71
	Togo	71
	Uganda	71
	Mozambique	71

Source: Data compiled by the UNWTO, based on information of national official institutions.  
 Note: a Scores range from 0 to 100; the higher the score, the better. Destinations with the same score are tied, and so have the same rank; these appear in alphabetical order in the table. *Openness* indicates to what extent a destination is facilitating tourism. It is calculated by summing the percentage of the world population exempt from obtaining a visa, with the percentages of visa on arrival weighted by 0.7 and eVisa by 0.5.

exemptions (23 percent) and eVisa alternatives (8 percent).

When traveling to the Americas, 60 percent of the world's population are required to obtain a traditional visa prior to departure. However, this figure varies widely across the subregions of the Americas. While North America is one of the most restricted subregions, where only 11 percent of the world's population can enter without a visa,<sup>9</sup> the Caribbean is the third most open subregion in the world: 39 percent of the world's population have visa exemptions and 8 percent have the ability to obtain a visa on arrival. Destinations in the two other subregions—Central and South America—also abolished visas for comparatively many source markets, making the Americas the leading region in visa exemptions (31 percent of the world's population do not need a visa to visit the Americas; see Table 2).

Africa requires a visa prior to departure from 62 percent of the world's population, but, at the same time, has the highest percentage of countries whose visitors are able to obtain a visa on arrival (29 percent). However, this figure varies significantly across the African subregions. In Central Africa, the use of

traditional visas—required for 92 percent of the world's population—is highest of all Africa's subregions. East Africa, in contrast, has the lowest in the world: only 33 percent of the world's population are required to have traditional visas. Visa on arrival is popular in East Africa (62 percent), making East Africa the second most open subregion in the world.

In the Middle East, 70 percent of the world's population are required to obtain a traditional visa prior to departure to any of its destinations, but 20 percent are allowed to obtain a visa on arrival and 10 percent to use an eVisa. Interestingly, the Middle East has the highest percentage of the world's population subject to eVisa among all five regions analyzed. At the same time, however, the abolishment of any visa is the lowest among all five regions, with only 1 percent of the population not required to obtain a visa of any kind.

European destinations are among the most restrictive, requiring, on average, 72 percent of the world's population to obtain a visa before departure, while 21 percent are not required to obtain a visa and 6 percent can obtain it on arrival. All four European subregions show more or less comparable patterns.

Analyzing the importance of the different measures, we find that:

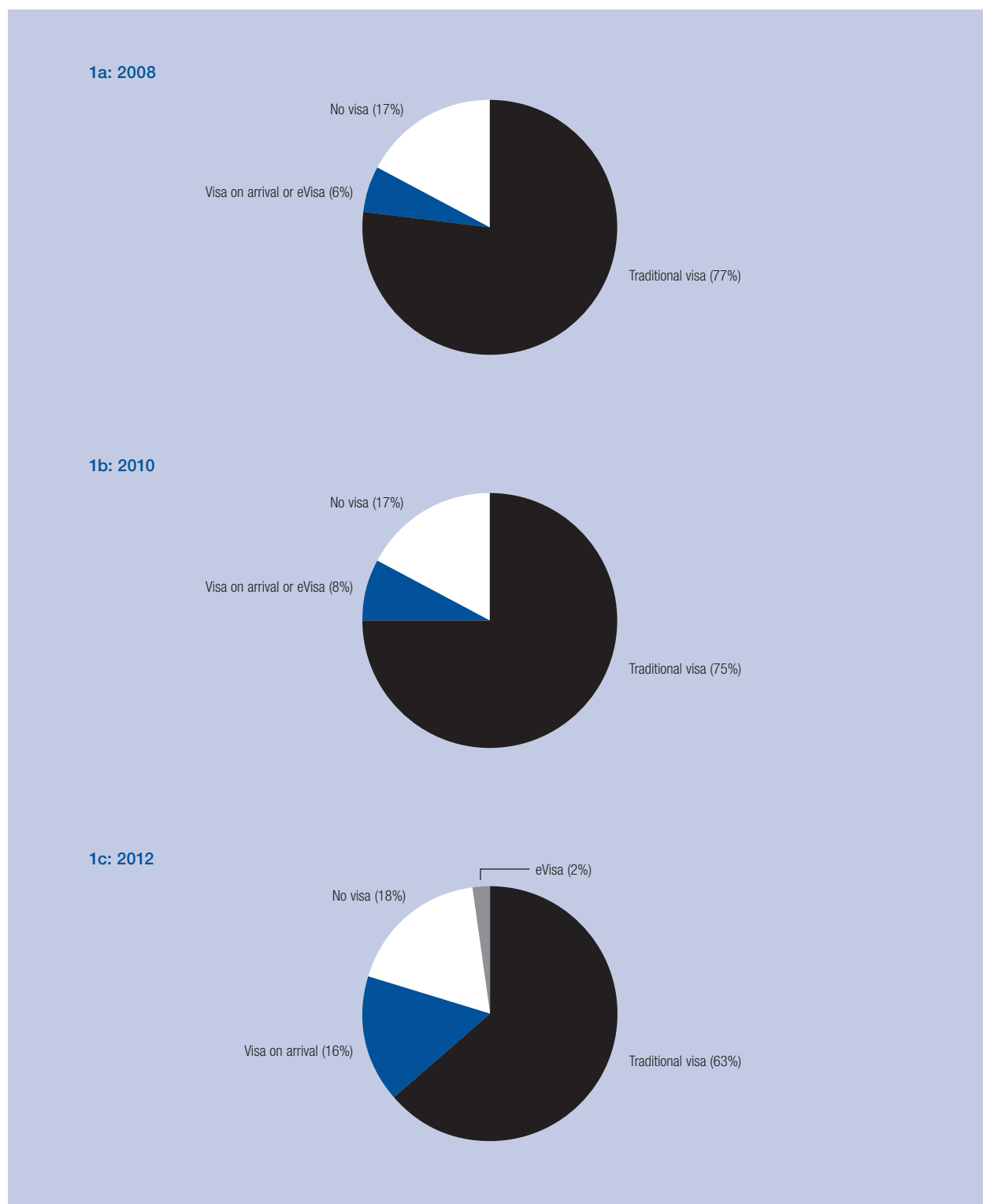
- visa exemption is most common in the Caribbean (39 percent) and Central America (30 percent);
- visa on arrival is comparatively common in East Africa (62 percent) and Southeast Asia (35 percent);
- eVisa is particularly popular in South Asia (11 percent) and the Middle East (10 percent); and
- traditional visas are most prevalent in Central Africa (92 percent) and North America and North Africa (both 84 percent), followed by Northeast Asia, the four European subregions, and the Middle East (all 70 percent or higher).

## PROGRESS MADE IN RECENT YEARS

Looking into the evolution of visa formalities in recent years, data show a recent and strong tendency toward improvement. At the beginning of 2008, destinations around the world required, on average, 77 percent of the world's population to obtain a traditional visa before visiting, but this percentage went down to 74 percent in 2010 and dropped further, to 63 percent, in 2012 (Figure 1).

The reason for this remarkable and substantial improvement to facilitation between 2010 and 2012 is the determined action taken by governments. In total, visa requirements were facilitated for 5,080 destination-source market pairs between 2010 and 2012 (Table 3). Destinations facilitated visiting by citizens of another country by either simply abolishing the visa

Figure 1: Evolution of visa requirements for world population, 2008, 2010, and 2012



Source: Data compiled by the UNWTO, based on information of national official institutions.

requirement altogether, or allowing a visa to be obtained on arrival or in electronic form—an eVisa. A total of 43 destinations significantly facilitated travel for citizens of 20 or more countries by changing their visa policies from *visa required* to *eVisa*, *visa on arrival*, or *no visa required*. These 43 destinations introduced a total of

5,044 individual measures and contributed by far the majority of the 5,080 total improvements introduced by all destinations between 2010 and 2012. This significant improvement demonstrates that destinations, when reviewing their visa policies, tended to thoroughly review and introduce changes.

**Table 3: Forty-three destinations that improved visa procedures for 20 or more countries of origin, 2010–12**

Number	Destination	Number of improvements
1	Micronesia	194
2	Niue	194
3	Palau	194
4	São Tomé e Príncipe	194
5	Tuvalu	194
6	Djibouti	192
7	Haiti	190
8	Mozambique	189
9	Rwanda	181
10	Burundi	179
11	Togo	179
12	Cape Verde	178
13	Mali	172
14	Kyrgyzstan	166
15	Uganda	161
16	Guyana	157
17	United Arab Emirates	150
18	Laos	144
19	Kenya	138
20	Ecuador	126
21	Tanzania	126
22	Armenia	123
23	Bolivia	121
24	Macao SAR	120
25	Gambia	115
26	Sri Lanka	114
27	Georgia	112
28	Nicaragua	109
29	Tajikistan	77
30	Bangladesh	55
31	Bonaire	54
32	Cayman Islands	51
33	Zambia	50
34	French Polynesia	49
35	St Lucia	44
36	St Kitts & Nevis	39
37	Nauru	37
38	Burkina Faso	36
39	Ethiopia	35
40	New Caledonia	33
41	Trinidad & Tobago	26
42	Australia	24
43	Senegal	22
<b>SUBTOTAL</b>		<b>5,044</b>
Other destinations		36
<b>TOTAL</b>		<b>5,080</b>

Source: Data compiled by the UNWTO, based on information from national official institutions.  
 Note: An *improvement* is the facilitation of a visa formality by either simply abolishing the traditional paper visa or allowing an eVisa or visa on arrival. Each destination–country of origin pair is calculated.

Analyzing all facilitation techniques, the most common change was from *visa required* to *visa on arrival*, which represented nearly 70 percent of all changes. Although eVisa and similar measures were also introduced, their importance was still minor in comparison to the other facilitation measures.

## OUTLOOK

In 1963, the United Nations Conference on International Travel & Tourism in Rome stressed the dependency of tourism development on the actions of governments, especially the facilitation of governmental formalities for international travel. Fifty years later, in November 2012, the UNWTO/World Travel Market Ministers' Summit in London concluded that visa processes and policies still present major barriers to Travel & Tourism. The summit noted that restrictive visa-issuance policies and complicated entry formalities are still stifling tourism growth, particularly from emerging economies—which are also some of the fastest-growing source markets for tourism.

However, it is also evident that the link between visa facilitation and economic growth through tourism is increasingly recognized by national authorities, which have accompanied such recognition with concrete facilitation measures. Furthermore, the clear tendency to ease visa procedures observed during the period 2010–12, as demonstrated in this chapter, is likely to continue.

The UNWTO will continue to promote and advocate for visa facilitation to support economic growth and development through tourism. The 94th session of the UNWTO Executive Council (held in October 2012) requested that the Organization make visa facilitation a priority area. The Executive Council further requested, in cooperation with the International Civil Aviation Organization and other partners, that it continue providing case studies as well as benchmarking information to support this process and better understand the progress already made.

## NOTES

- 1 UNWTO 2011.
- 2 United Nations Conference on International Travel and Tourism 1964.
- 3 The *T20 Ministers* refers to the Tourism Ministers of the G-20 economies. The G-20 economies are Argentina, Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Japan, Mexico, the Republic of Korea, Russia, Saudi Arabia, South Africa, Spain, Turkey, the United Kingdom, and the United States. See UNWTO/WTTC 2012.
- 4 UNWTO/WTTC 2012.
- 5 UNWTO/WTTC 2012, pp. 17–18.
- 6 WTTC 2012.
- 7 In 2012, eVisas were accounted for separately for the first time. In 2008 and 2010, eVisas and visas on arrival belonged to the same category.



- 8 Weighting is as follows: Visa not required = 1, Visa on Arrival = 0.7, eVisa = 0.5. Data for regions and subregions are average data and might not fully reflect the situation for all countries, especially in less homogenous subregions such as Africa, South Asia, and Central and Eastern Europe.
- 9 Although not all eVisa programs are technically classified as visas (for example, the Electronic System for Travel Authorization, or ESTA, in the United States is not a visa according to law), they are similar in form and function and have been therefore categorized as eVisas.

## REFERENCES

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- WTTC (World Travel & Tourism Council). 2012. "G20 Recognises Travel & Tourism as a Driver of Economic Growth for the First Time and Commit to Work on Travel Facilitation." June 20. Available at <http://www.wttc.org/news-media/news-archive/2012/g20-recognises-travel-tourism-driver-economic-growth-first-time/>.



# The Economic Benefits of Aviation and Performance in the Travel & Tourism Competitiveness Index

JULIE PEROVIC

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The aviation industry supports tourism and international business by providing the world's only rapid worldwide transportation network. Airlines transported 2.8 billion passengers and 47.6 million metric tonnes of air cargo in 2011, connecting the world's cities with 36,000 routes.<sup>1</sup> By providing these services, the aviation industry plays an important role in enabling economic growth and providing various economic and social benefits.

The International Air Transport Association (IATA) commissioned Oxford Economics to estimate the economic and social benefits of aviation in over 80 countries worldwide over the last three years. The analysis includes the traditional economic footprint of the industry, measured by aviation's contribution to gross domestic product (GDP), jobs, and the tax revenues generated by the sector and its supply chain. However, the economic value created by the industry goes beyond the value captured by these measures. Therefore the study also investigates the positive impacts of the connectivity provided by air transport services. The connections made between cities and markets produce an important infrastructure asset that facilitates activities that enhance a nation's productivity. More specifically, air transport enables foreign direct investment (FDI), business cluster development, specialization, and other spillover effects. The analysis produced by Oxford Economics is one of the first attempts to estimate these benefits of connectivity.

The objective of this chapter is twofold. First, the following sections will present some of the results of the Oxford Economics studies on the benefits of aviation, primarily in regard to aviation's economic footprint and connectivity benefits. Second, the chapter will explore whether there are any relationships between the performance of particular components of the Travel & Tourism Competitiveness Index (TTCI) and the outputs of the benefits of aviation studies.

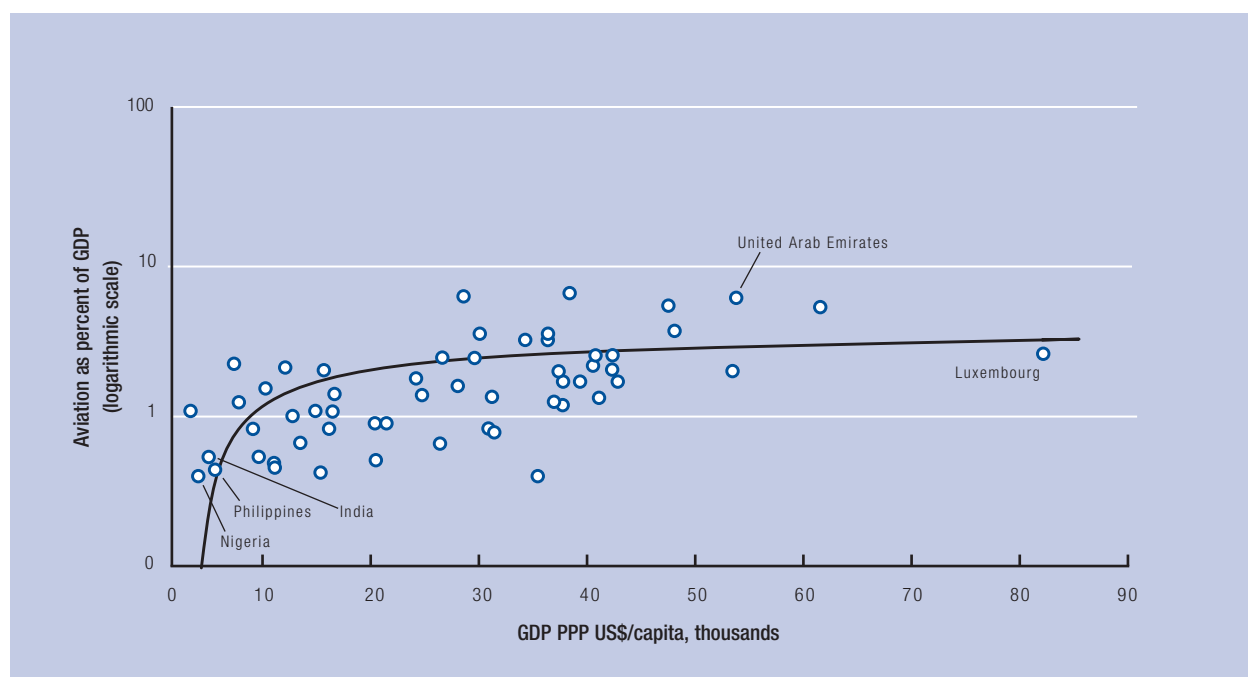
## THE ECONOMIC FOOTPRINT OF AVIATION

The aviation industry *directly* generates employment and economic activity across several areas, including the operation of airlines and ground-based infrastructure. The aviation sector's direct impact on jobs and GDP in any given nation is reflected by the domestic resources used to deliver all such services.

The resources deployed by the aviation sector are measured by their gross value added (GVA). Oxford Economics estimated GVA either by considering the output created by the sector less the cost of purchased inputs (a net output measure), or by the sum of profits and wages (before tax) generated from the sector's economic activity (an income measure). This gives the sector's direct contribution to GDP.<sup>2</sup>

Worldwide, in 2010 the aviation sectors directly contributed 8.4 million jobs and US\$539 billion to global

Figure 1: The aviation sector as percentage of GDP and GDP per capita



Source: Data from Oxford Economics, 2010.

Note: These data present the GVA of the aviation sector, including direct, indirect, and induced impacts.

GDP—a contribution that is about the same economic magnitude as that of Switzerland or Poland.<sup>3</sup>

The sector's economic footprint is calculated by adding to this direct contribution the output and number of jobs from industries *indirectly* connected to aviation, as well as the output and jobs supported by the spending of those employed in aviation's direct and indirect workforce. In addition, wider catalytic benefits induced by the aviation sector through tourism are also included in the total economic footprint of the industry. These benefits will be detailed in the next section.

*Indirect industries* are simply defined as the aviation supply chain, which includes businesses such as fuel suppliers, construction companies, and a host of professional service providers. The aviation industry supply chain supported 9.3 million jobs worldwide in 2010, and contributed US\$618 billion to global GDP in the same year.<sup>4</sup> Other flow-on impacts of the aviation industry result from the spending and consumption of those directly and indirectly employed in the sector. The economic activity of those individuals supports jobs in other industries, such as retail outlets and a variety of consumer goods and services providers.<sup>5</sup> Globally, the aviation industry has induced 4.4 million jobs through the spending and consumption of air transport's direct and indirect employees. The induced contribution to GDP was estimated to be US\$288 billion globally in 2010.<sup>6</sup>

Together, these three channels provide the aviation sector's total impact in terms of jobs and contribution to GDP—over 22 million jobs and US\$1.4 trillion in GDP.<sup>7</sup>

The Oxford Economics study of 80 plus nations revealed that aviation was also a significant contributor at the country level. Nations that are geographically isolated and island states showed a greater economic dependence on the aviation sectors. For example, countries such as Iceland and New Zealand have aviation sectors that generated more than 5 percent of their total GDP in 2010. But even nations without these geographical characteristics showed the importance of air transport. Aviation is critical to the economy of the United Arab Emirates (UAE), with the sector opening foreign markets to UAE exports, lowering long-distance transport costs, and increasing the flexibility of labor supply. In this nation, aviation contributes more than 6 percent to GDP.

In a majority of the developed nations studied, aviation was found to contribute at least 2 percent to GDP, suggesting that the aviation industry and a high level of development mutually reinforce each other. That is, as a nation develops, so does the aviation sector, and, as the aviation sector develops, economic activity and living standards are improved. Figure 1 shows that many countries with lower levels of development—including India, Nigeria, and the Philippines—have aviation sectors that contribute less than 1 percent to GDP. The opposite is true for nations with higher levels of development, where aviation makes a more significant contribution to GDP. As a result, one can infer that a well-established air transport industry might play a role in facilitating growth in a nation's standard of living.

### WIDER CATALYTIC BENEFITS: TOURISM

The aviation sector also contributes to other industries by facilitating their growth and supporting their operations, even if these industries are far removed from the direct or indirect components of the aviation sector itself. For example, air transport acts as a catalyst for wider benefits in its role as a critical component and facilitator of global business and tourism. Through its speed, convenience, and affordability, air transport has increased the opportunities for both leisure and business travelers to experience a host of geographies, cultures, and markets. With 51 percent of international tourists traveling by air,<sup>8</sup> the aviation sector is critical to the tourism industry, which in turn is an important source of economic growth for many countries, particularly developing ones. Globally, air transport supports 34.5 million jobs within tourism, contributing around US\$762 billion per year to world GDP.<sup>9</sup>

When combining the direct, indirect, and induced benefits detailed in the previous section with its tourism catalytic benefits, aviation's global *economic footprint* is estimated to include 56.6 million jobs and contribute US\$2.2 trillion to global GDP. Considering its economic footprint results at the country level also presents some interesting findings. For example, through direct, indirect, and induced channels, aviation makes a significant contribution to GDP in both the Maltese and Lebanese economies, composing 2.5 percent and 2.0 percent of the GDP of those countries, respectively. But with a vast majority of visitors arriving by air to both these nations, when air transport's contribution to the tourism industry is added to estimate the total economic footprint, these figures rise to 18 percent of Maltese GDP and 17 percent of Lebanese GDP.<sup>10</sup>

### BENEFITS OF AIR TRANSPORT CONNECTIVITY

IATA developed a connectivity indicator to measure the degree of integration a nation has within the global air transport network. The connectivity indicator reflects the number and economic importance of the destinations served from a country's major airports, as well as the frequency of service and the number of onward connections available through each country's aviation network. Connectivity increases when any of these parameters increases.<sup>11</sup>

The development of the aviation industry over recent decades has led to an improvement in this connectivity. As a consequence, air transport passengers have reaped several benefits, including reductions in travel time, increased availability and frequency of services, improved scheduling, and better overall quality of service (including improved reliability and punctuality).

Moreover, improvements in connectivity have also resulted in a gradual drop in air travel costs. The cost of air transport services, in real terms, has fallen by around 1 percent per year over the past 40 years. Air transport

has also become more affordable when compared with other modes of travel: its relative cost has fallen by an estimated 2.5 percent per year since the 1990s.<sup>12</sup> These developments have contributed to the rapid expansion in passenger and air freight volumes over the past 40 years. Air transport has also steadily become more competitive relative to other modes of transport.<sup>13</sup>

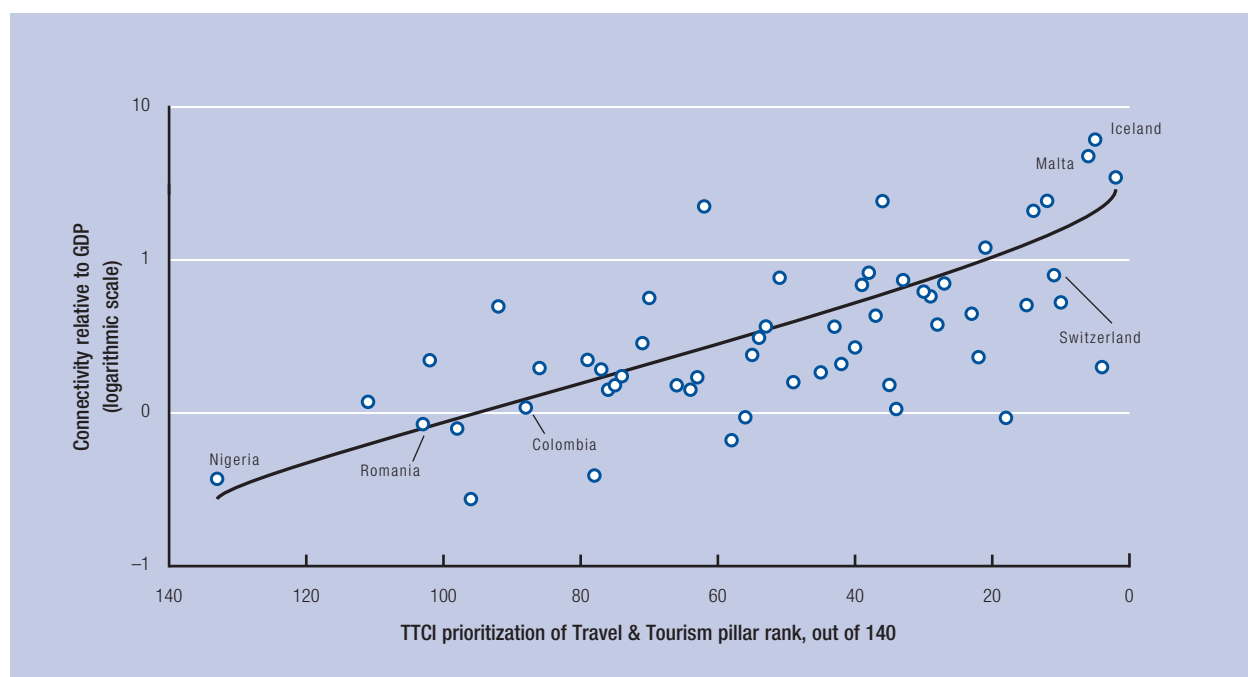
Apart from the benefits to direct users of air transport services, the largest economic benefit of increased connectivity comes through its impact on the long-term performance of the wider economy.

### CONNECTIVITY AND ECONOMIC PERFORMANCE

Improvements in connectivity contribute to the economic performance of the wider economy by enhancing its overall level of productivity. Higher productivity in firms outside the aviation sector is achieved in two ways. First, productivity is enhanced for domestic firms by their increased access to foreign markets as well as increased foreign competition in the home market. Second, productivity improvements also result from the freer movement of investment capital and workers between countries.<sup>14</sup>

By giving domestic-based businesses greater access to foreign markets, air transport connectivity supports exports and simultaneously increases competition and choice in the home market from foreign-based producers. This in turn encourages firms to specialize in areas where they possess a comparative advantage, allowing for opportunities to exploit economies of scale, which reduces production costs and ultimately benefits domestic consumers. Costs can also be reduced by the exposure of domestic firms to international best practices in production and management and by encouraging innovation. Competition can further benefit domestic customers by reducing the markup over cost that firms charge their customers, especially in cases where domestic firms have previously experienced some shelter from competition.<sup>15</sup>

Increased connectivity can also improve economic performance by making it easier for firms to invest outside their home country. The clear link between connectivity and FDI is that foreign investment necessarily involves some movement of human resources to facilitate the transfer of technical knowledge and/or management oversight. Moreover, increased connectivity allows firms to exploit the speed and reliability of air transport to ship components between plants in distant locations, thus reducing the need to hold expensive stocks of inventory as a buffer. Finally, improved connectivity may favor inward investment because increased passenger traffic and trade that accompanies improved connectivity can lead to a more favorable environment in which foreign firms can operate.<sup>16</sup>

**Figure 2: Air transport connectivity and pillar 5 (prioritization of Travel & Tourism)**

Sources: Connectivity data: Oxford Economics, 2010; TTCI data: World Economic Forum.

Variation in the results of previous research suggests that measuring connectivity impacts on long-term economic growth is not straightforward. Because the supply-side benefits of connectivity come through promoting international trade and inward investment, any impact is likely to become evident gradually over time. This prolonged process makes it difficult to extract the specific contribution that improved connectivity has had on long-term economic growth from the many other variables that impact an economy's performance. Based on a conservative estimate, a 10 percent increase in global connectivity (relative to GDP) would see a 0.07 percent increase in long-run GDP per annum.<sup>17</sup> Given the increase in global connectivity from improved air transport over the last decades, Oxford Economics estimates this benefit is valued at over US\$200 billion to global GDP.<sup>18</sup>

### BENEFITS OF AVIATION AND THE TTCI

In addition to presenting the results of the benefits-of-aviation studies, this chapter will next explore the relationships between performance in the TTCI and the economic benefits of aviation. One possible link between performance and aviation could be that countries performing strongly in particular components of the TTCI would have the government policy and agenda settings to support a more highly developed aviation sector.

The degree to which governments prioritize the Travel & Tourism (T&T) sector has an important impact on T&T competitiveness, and is also likely to have an impact on the development of the aviation sector. By making clear that Travel & Tourism is a sector of

primary concern, and by reflecting this in its budget priorities, a government can channel needed funds to essential development projects. This prioritizing signals the government's intentions, which can have positive spillover effects—attracting further private investment into the sector. Prioritization of the sector can also be reflected by the country's attendance at international T&T fairs and commissioning effective marketing campaigns.<sup>19</sup> A component of TTCI subindex A (the T&T regulatory framework) pillar 5, entitled prioritization of Travel & Tourism, is a measure of how governments prioritize the T&T sector.

Figure 2 presents the relationship between a nation's performance in TTCI pillar 5 and air transport connectivity relative to GDP.

The air transport connectivity measure reflects the range, frequency of service, and economic importance of destinations and the number of onward connections available through each country's aviation network. Discussion in the previous section detailed the ways in which greater connectivity leads to economic growth through increases in overall productivity. Given the strength of the relationship presented in Figure 2, it is clear that, when governments place a relatively high emphasis on Travel & Tourism, the results can be far reaching and have important long-term benefits. Budget allocations, campaigns, and signals to the private sector that Travel & Tourism is an agenda priority can help support development of the aviation sector and thereby enable a nation to become more globally connected. This in turn can lead to increased trade and competition, cost reductions for consumer and producers, and



increased FDI—all of which will enhance productivity and standards of living in the long run. According to the relationship presented in Figure 2, nations such as Iceland, Malta, and Switzerland stand to benefit from the higher degrees of air transport connectivity that is being supported by strong government prioritization of the T&T sector. Colombia, Nigeria, and Romania could potentially see increased air transport connectivity—and thereby increases in long-term economic growth—if governments placed greater emphasis on developing the T&T sector.

The importance of air transport connectivity is also critical in the short term. Particular events in the recent past have made consumers and producers more aware of the costs of disruptions to the global air transport network—and the substantial benefit of connectivity. For example, when volcanic ash caused the closure of airspace throughout Europe in 2010, businesses of all types—from automotive to IT—experienced supply-chain failures and production delays, creating significant unexpected costs.<sup>20</sup>

## CONCLUSION

The aviation sector plays an important role in the global economy by providing connectivity through the only rapid worldwide transport network. In doing so, the direct and wider impact on jobs and GDP globally is enormous—contributing over 22 million jobs and US\$1.4 trillion in GDP. Moreover, the aviation sector makes contributions to other industries by facilitating their growth and supporting their operations. With a significant proportion of international tourists depending on air transport, the aviation industry supports 34.5 million jobs within tourism globally, contributing around US\$762 billion a year to world GDP.<sup>21</sup>

The benefits go beyond this economic footprint of aviation. The global connectivity that air transport facilitates has positive impacts that enhance overall productivity and economic growth in the long run. Given the increase in global connectivity over the last decades as a result of air transport, Oxford Economics estimates this benefit should be valued at over US\$200 billion to global GDP.

Exploring potential relationships between the results of the Oxford Economics studies on the benefits of aviation and the TTCl has found an interesting link. Figure 2 demonstrates the positive relationship between pillar 5, which considers the prioritization of Travel & Tourism within the context of subindex A (the T&T regulatory framework), and air transport connectivity relative to GDP. This suggests that making Travel & Tourism a government priority can enable the development of global connectivity through aviation, which in turn enhances the overall level of productivity and living standards in the long run.

## NOTES

- 1 ATAG 2012.
- 2 Oxford Economics 2011.
- 3 ATAG 2012.
- 4 ATAG 2012.
- 5 ATAG 2012.
- 6 ATAG 2012.
- 7 ATAG 2012.
- 8 ATAG 2012.
- 9 ATAG 2012.
- 10 Oxford Economics 2011.
- 11 IATA 2007. The connectivity indicator is based on the number of available seats to each destination served (during a given time period). The number of available seats to each destination is weighted by the size of the destination airport (determined by the number of passengers handled each year). The weighting for each destination gives an indication of the economic importance of the destination airport and the number of onward connections it can provide. All the destination weightings are then summed (and divided by a scalar factor of 1,000) to determine the connectivity indicator. A higher figure for the connectivity measure indicated a greater degree of access to the global air transport network.
- 12 Oxford Economics 2011.
- 13 Oxford Economics 2011.
- 14 Oxford Economics 2011.
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- 16 Oxford Economics 2011.
- 17 IATA 2007.
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# Travel & Tourism as a Driver of Employment Growth

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Travel & Tourism (T&T) is one of the leading job creators in the world. The industry employs more than 98 million people directly,<sup>1</sup> representing over 3 percent of all employment. When indirect and induced impacts are included, the industry contributes to around one in every eleven jobs worldwide.<sup>2</sup> The share of world employment in Travel & Tourism is greater than that for the auto manufacturing and chemicals manufacturing industries combined, across every region of the world. Furthermore, the outlook for the industry is relatively positive: job growth in Travel & Tourism is forecast to average 1.9 percent per year over the next decade, compared with 1.2 percent annual growth forecast for total jobs in the global economy.

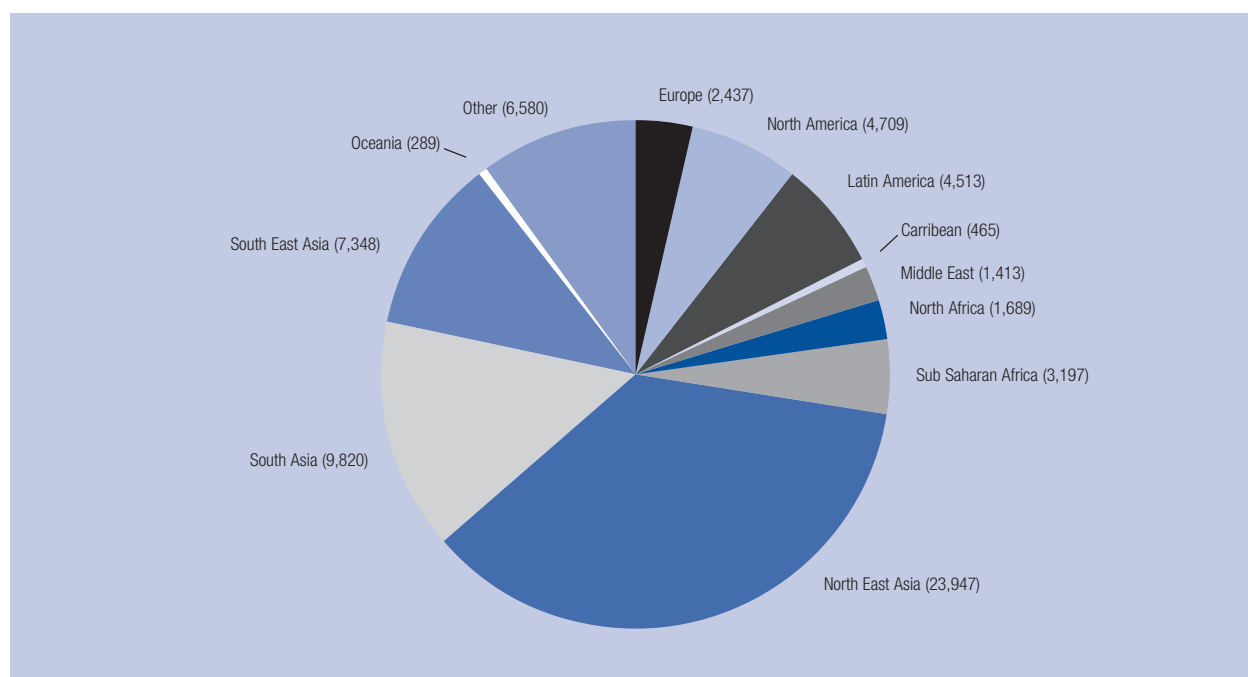
This chapter summarizes recent research by the World Travel & Tourism Council (WTTC) and Oxford Economics on jobs in Travel & Tourism using proprietary data for 20 countries, including both emerging and advanced economies.<sup>3</sup> Travel & Tourism was benchmarked against selected sectors for all regions of the world, and the research examined metrics that include Travel & Tourism's contributions to gross domestic product (GDP), employment, growth, export contribution, the strength of linkages, and job creation potential. Benchmarking the T&T industry provides perspective on its size and growth relative to other industries; it also helps to show how the industry can play an important role in driving employment growth.

The industries chosen as comparators in this research were selected because they have a breadth and global presence similar to Travel & Tourism. These industry sectors are relatively easy to define, and therefore to quantify. They include some that have recently benefitted from overt and well-publicized government support (the multibillion dollar bailout of the US automobile industry in January 2009 is a very recent example). The industry sectors benchmarked against Travel & Tourism in this research are:

- mining, including the extraction of oil, natural gas, coal, and metals;
- education, including all levels of educational services;
- chemicals manufacturing, including drugs and medicines, plastics, rubber, paint, polishes, ink, perfumes, cosmetics, soap, cleaning materials, fertilizer, pesticides, other chemicals;

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The research and analysis presented in this chapter was based on custom research completed by Oxford Economics. The input-output portion of the analysis used data generated by the respective national statistics or economic agencies. Some of these data are maintained by and were obtained from Eurostat; for other countries these data were obtained directly from the relevant national agency.

**Figure 1: Regional contribution to global T&T total employment growth, thousands of jobs (2012–22)**

Source: Oxford Economics, mid-year update 2012 of annual economic impact figures.

- automotive manufacturing, including motor vehicles and parts and accessories;
- communications, including postal services (national and private) and telecommunications; and
- financial services, including banking, investment services, and insurance.

Understanding the significance of Travel & Tourism in many countries and its potential as a driver of employment growth is crucial, especially with the high levels of unemployment or underemployment now prevalent in many countries.

### JOB CREATION AND ECONOMIC DEVELOPMENT

Over the last two decades, Travel & Tourism has played a more and more important role in the economic development of many countries. Increased travel across the globe has been driven by growth in real incomes; greater amounts of leisure time; improved and highly accessible transportation systems; ongoing globalization of business linkages, including supply chains; highly effective communication systems that facilitate marketing; and a significant number of new tourism services.

Although initial infrastructure investment is needed, as more people travel, additional tourism infrastructure is built and people are employed to service the needs of the tourists. The more visitors go to a destination, the more hotels, restaurants, and ancillary tourism services are needed and the more jobs in Travel & Tourism are created. The benefits of the Travel & Tourism-related

jobs are then further multiplied through the economy to the suppliers that support the industry.

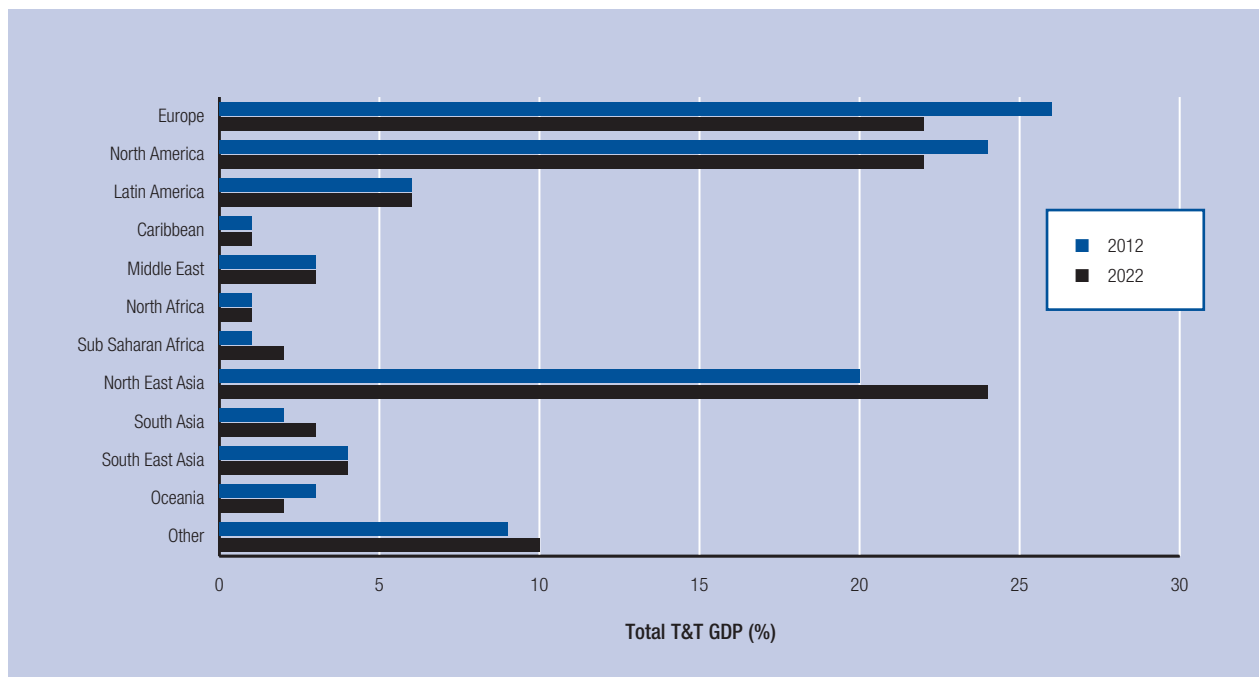
Travel & Tourism is a particularly attractive option for stimulating development in rural and low-income countries and regions that have previously relied heavily on subsistence agriculture, natural resource extraction, or informal self-employment. Tourism development may also be welcomed by local populations because it can generate stable employment and income while promoting cultural heritage and traditions—all elements of a destination that are particularly attractive to visitors.

Although the rise in emerging-market destinations explains some of the observed strong growth in T&T employment, many countries are also shifting away from manufacturing to service economies. These service economies are much more labor-intensive than mechanized, manufacturing economies. As this shift from manufacturing to the service sector increases, so the share of T&T employment out of total employment will probably increase, as will the share of tourism's contribution to total GDP.

Employment in Travel & Tourism as a share of total global employment followed a general upward trend throughout the 1990s and the early 2000s, falling back in more recent years partly because of cyclical patterns and changes in the destination mix for global Travel & Tourism. By the mid-2000s, direct employment in the industry edged over 3.5 percent.

The T&T sector tends to follow the general business cycle in an exaggerated way, with growth stronger than average during periods of expansion and job losses more severe than average during recessions. During

Figure 2: Contribution to global T&amp;T GDP by region, 2012–22



Source: Oxford Economics, mid-year update of 2012 annual economic impact figures.

periods of economic slowdowns, disposable income growth slows and leaves fewer resources available to consumers for travel, resulting in both fewer trips and less-expensive travel options. Seeking out cost savings, leisure travelers might choose a closer-to-home destination (which potentially increases visitor numbers in some destinations) or a shorter holiday package, or reduce their budget for eating out and purchasing souvenirs. Business travel budgets also typically come under pressure during economic downturns, as they are often viewed as an area where companies can save costs. Of course, the dynamics operate in the opposite direction during expansionary periods.

In the late 1990s, global employment in Travel & Tourism was growing at rates of up to 4 percent per year. The pace of growth slowed along with most major economies during the downturn in 2001 and 2002, and the change in employment in Travel & Tourism was more pronounced than it was for employment overall. During the expansion of 2003–06, global employment in the industry returned to its role of outpacing overall employment growth; again, it suffered harsher-than-average losses during the most recent recession in 2009.

Employment recovery has now begun and the forecast expects employment growth in Travel & Tourism to outpace overall employment growth. The annual economic impact research carried out by WTTC and Oxford Economics found, in part, that T&T direct employment is expected to grow at an average 1.9 percent per annum over the next 10 years, compared with total employment growth of 1.2 percent each year

through to 2022. This premium can be partly explained by the continued rise in T&T demand from emerging markets. Indeed, looking at the economic impact of Travel & Tourism as a whole, Oxford Economics expects the industry's contribution to GDP to grow at an average annual rate of 4.2 percent over the next 10 years, stronger than overall global growth predictions of 3.6 percent.

#### BENCHMARKING JOB CREATION REGIONALLY

In all regions of the world except for Africa, employment in Travel & Tourism is expected to be stronger than overall employment growth (Figures 1 and 2). While T&T employment in Africa is still expected to grow by 2.3 percent per year for the next 10 years and reach 2.9 percent of total employment by 2022, the industry faces a number of infrastructure and investment challenges in the region that are holding back its progress, and the transition to service economies on the continent is not as advanced as it is in other parts of the world. Still, with 8 million direct employees in Africa, Travel & Tourism is one of the leading employers in the region, surpassing the direct job creation of each of the chemicals manufacturing, auto manufacturing, communications, mining, and financial services industries.

Incomes continue to rise in Latin America and the Middle East. These regions are expected to lead Travel & Tourism employment growth, with annual growth rates forecast at 2.4 percent and 2.5 percent, respectively. In the Middle East specifically, increased T&T development is also contributing to a wider strategy of greater diversification away from a reliance on

hydrocarbons. With 1.8 million direct employees, Travel & Tourism is one of the leading employers in the region, surpassing the job creation of all comparative industries except education. Travel & Tourism directly employs more than twice as many people in the Middle East than the mining industry (including oil extraction), although it is worth much, much less in its contribution to GDP.

Of the increase of 66 million T&T jobs forecast worldwide in the next 10 years, 62 percent are expected in the Asia Pacific region, an expected overall growth rate of 1.9 percent per annum from 2012 to 2022. Within the region, India and China were directly responsible for 48 percent of T&T jobs worldwide during 2011, compared with 43 percent across all other sectors of the economy. In Asia, there are seven times as many T&T jobs as auto manufacturing jobs and five times more than chemicals manufacturing jobs. Travel & Tourism directly employs nearly as many people as the region's entire education sector.

Over the same period, from 2012 to 2022, T&T employment growth in Europe is expected to trail the rest of the world with an annual growth rate of only 1.2 percent. The majority of Travel & Tourism in Europe is intra-regional and is impacted strongly by the ongoing debt challenges and fiscal adjustments in the region. Industry employment reached 10 million in 2011, and exceeds that of the automotive manufacturing sector by a factor of three.

The North American market—which has a higher proportion of people employed in Travel & Tourism than the other regions, at 4.4 percent—is expecting moderate growth of 1.5 percent per annum in the decade to 2022. Travel & Tourism directly supports nearly seven times more jobs than the automotive manufacturing sector and directly supports the same number of jobs as the financial services sector in the United States. In Canada, the industry employs more people than mining, automotive, and chemicals manufacturing.

## ECONOMIC BENEFITS AND LINKAGES THROUGHOUT ECONOMIES

Measuring the contribution of one sector of the economy such as Travel & Tourism against the total requires an assessment of economic values on a number of levels. Impacts are measured on a direct basis (e.g., the people employed in a hotel), an indirect basis (e.g., the construction, including workers and materials, required to build a hotel), and an induced basis (e.g., the increased employment and GDP created by hotel and construction workers and the hotel guests buying food from a local shop). However, other issues—such as the strength of the linkages between tourism and other sectors of the economy, multiplier effects (changes in income and employment resulting from a change in expenditure), and leakages (the proportion of tourist

expenditure that does not remain in the economy)—must also be assessed.

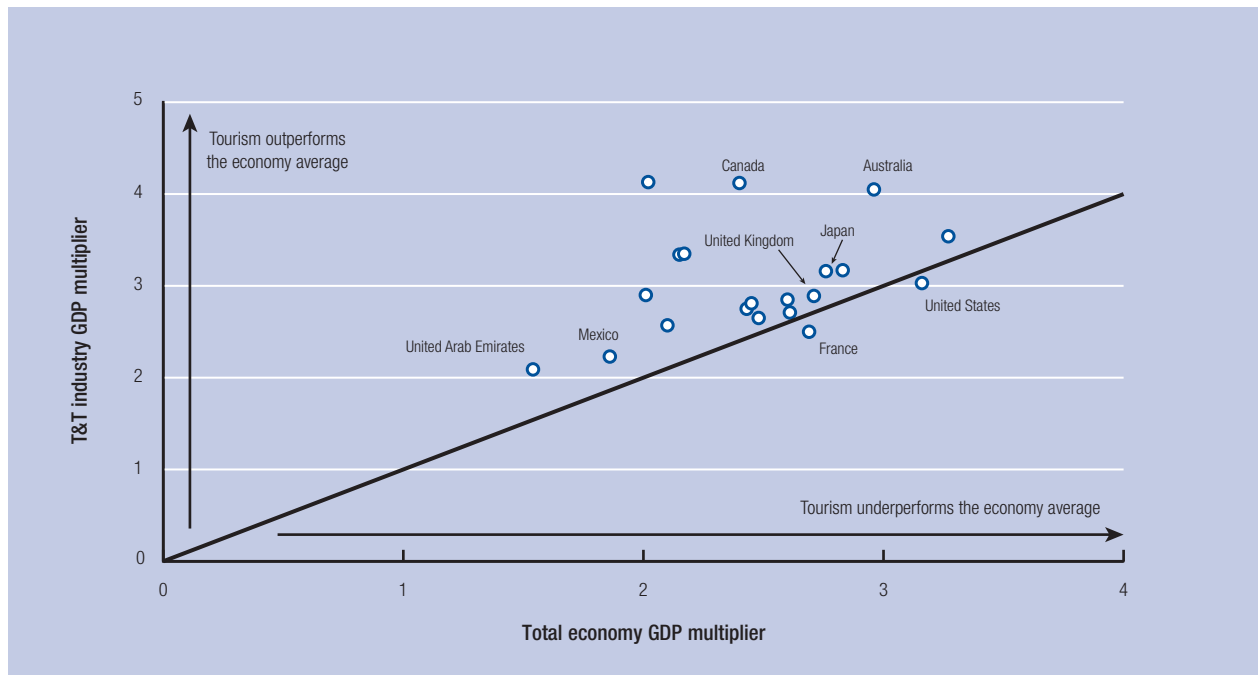
In 2011, Travel & Tourism generated US\$2 trillion in direct contributions to the world's economy. This contribution to global GDP is more than double that of the automotive industry and one-third larger than the global chemicals industry. The T&T sector is three-quarters the size of the global education, communications, and mining sectors. With the addition of indirect and induced economic impacts, the total GDP impact of Travel & Tourism was US\$6.3 trillion in 2011.

As well as being an important generator of direct employment and new job creation, broader economic benefits are generated by T&T activity. The industry has widely dispersed linkages throughout national economies, both in terms of industrial connections and because of its tendency to be less geographically concentrated than many other industries. The wide distribution of Travel & Tourism within countries is an important dimension to its economic value. Further analysis of the results of this research determine that Travel & Tourism ranks as the second-most evenly distributed industry in terms of employment and GDP across the 20 countries and six comparator industries analyzed (education, as expected, is closely linked to demographics and thus is the most evenly distributed among those benchmarked). As an industry with jobs that are impossible to send off shore, the benefits of Travel & Tourism have to be felt locally.

These strong industry linkages are also reflected in higher-than-average multipliers.<sup>4</sup> In 18 out of the 20 economies analyzed, one dollar spent on Travel & Tourism generates more total economic output than the average dollar spent in the economy as a whole. As can be seen in Figure 3, of the 20 countries studied, only in France and the United States is the value of Travel & Tourism's economic multiplier less than the total income average. This research compares the GDP multiplier for Travel & Tourism with the average economy multiplier for the other countries studied. On average, for every dollar spent across the 20 countries, 2.7 dollars are generated (this includes indirect and induced impacts); yet for every dollar spent on Travel & Tourism, 3.2 dollars are generated. Travel & Tourism's broader impact per unit of direct GDP also exceeds that of communications, financial services, education, and mining and reflects the integrated nature of the T&T industry within an economy. Only chemicals and auto manufacturing were found to have higher multipliers across the 20 countries analyzed.

In terms of job creation, one dollar spent on Travel & Tourism is more powerful than one dollar spent in other sectors across most of the 20 countries. The only countries where this is not the case are those in which agriculture remains a significant employer (such as China, India, and Indonesia). After education, Travel & Tourism is one of the top job creators, with an average

Figure 3: Comparing T&amp;T and total economy multipliers, by income



Source: Oxford Economics.

of 50 jobs created for every US\$1 million invested. US\$1 million invested in tourism creates twice as many jobs as US\$1 million in each of the financial services, communications, and auto manufacturing sectors.<sup>5</sup>

By analyzing input-output data looking at how output from one industrial sector may become input in another, these linkages between Travel & Tourism and the broader economy were identified and quantified, and include both supply chain and income effects. These relationships help to assess the ways in which the rest of the economy benefits from T&T linkages. Increased demand in Travel & Tourism usually spurs additional production in industries that rely heavily on domestic inputs, so the supply chain effects of Travel & Tourism are significant.

Industries can also be evaluated on the basis of how the income they generate flows to households and to other parts of the economy. The industries most supportive of economic development tend to be those that produce the most household income and retain a higher share of expenditure within the local economy. For example, on average across the countries analyzed, for every US\$1 million that is spent in Travel & Tourism, US\$701,000 in income is generated. This exceeds the income generated for automotive manufacturing, communications, chemicals, and mining. In terms of money retained in the local economy, of the countries looked at in this study, on average, 91 percent of tourism expenditures are retained while just 9 percent leaks out as imports. There are large variations to be found, however, and while other countries might experience far higher leakages, an import leakage in one country

will be an export gain in another. On average, the share of income from Travel & Tourism retained in national economies is greater than the share from each of the mining, chemicals, and auto manufacturing sectors.

### SUPPORTING BROADER ECONOMIC DEVELOPMENT

The development of Travel & Tourism can support broader economic development in part because the industry cuts across and is linked to many other industries in the economy, generating additional demand in a wide range of services and professions. In addition to the direct and indirect effects described above, Travel & Tourism can also produce other valuable spinoff benefits by contributing to infrastructure that other industries can use, and by boosting trade, skills, and investments.

Business travel, for example, is a vital contributor to the economy of most countries, both developed and developing, and represents almost a quarter of the economic benefit from Travel & Tourism as a whole. It is also highly correlated with export growth—as one expands, the other tends to as well. Causality tests have shown that rising exports have an almost immediate impact on business travel volumes, while travel itself stimulates trade in the following years by building relationships and helping to secure deals.<sup>6</sup>

Additional benefits accrue beyond the advantages reaped by the direct participants because trade advances economic development by lowering prices, creating economies of scale, allowing countries to focus on areas of competitive advantage, spurring innovation,



and creating competition. The benefits that business travel brings to international trade also foster domestic and foreign investment. Foreign direct investments that result from business travel introduce capital, technology, skills, people, know-how, and demand for local supplies to the domestic economy; they also bring improvements in trade balances.<sup>7</sup>

In 2011, an estimated US\$650 billion in capital investment, or 4.5 percent of total global capital investment, was driven by Travel & Tourism. The bulk of this is related to individual investments in facilities that directly benefit tourists, such as the construction of hotels and resorts, consistent with the definition of T&T investment in the 2008 TSA Recommended Methodological Framework. Beyond this benefit, Travel & Tourism may also drive infrastructure improvements that benefit local residents and the wider economy, in addition to tourists. The development of restaurants, bars, cafés, retail establishments, and other tourism-related businesses can help to improve the quality of life for local residents by expanding the choices available to them in their community. Moreover, Travel & Tourism may help to motivate the development of collective investments in public utilities and transportation infrastructure including roads, airports, harbors, electricity, sewage, potable water, and communications infrastructure.

## POLICY IMPLICATIONS

The T&T industry remains under some pressure as the global economy continues on a path to recovery. Leisure travel demand has recovered in most origin markets, but business travel budgets remain constrained. This limitation remains, despite the clear benefits of business travel that may outweigh costs involved. On the supply side, some tourism promotion budgets remain lower than they were in earlier years, as public-sector cost savings are sought. Research from WTTC/Oxford Economics continues to make the case that cutting budgets and support for Travel & Tourism will have significant negative implications for the wider economy. Travel & Tourism is an important tool in economic development and growth strategy, and should be treated as such.

Travel & Tourism is a significant part of many national and regional economies around the globe, and supporting its expansion can be an integral part of a broader economic development strategy for both developed and developing nations as well as a potential tool for generating employment. It is essential for policymakers to differentiate between the global worth of the T&T sector and the relative importance of the industry to individual countries and regions. The contribution to GDP from Travel & Tourism may be small in the actual amount of income generated in a country or region, but if there is little alternative industry, its relative

importance and the percentage of the country's GDP that it contributes may be large.

In the 20 countries looked at in this research, Travel & Tourism is one of the most important industries in terms of absolute size of employment and output, and industrial linkages are strong and widely dispersed. The industry can also drive domestic investment and attract foreign direct investment as well, all of which create employment, generate income, and provide additional quality-of-life benefits to local residents. On a comparative scale, Travel & Tourism makes a larger economic contribution to the global economy than some notable high-profile sectors. It is an important industry to support as a potential tool for economic development.

## NOTES

- 1 WTTC 2012.
- 2 WTTC 2012.
- 3 The countries analyzed in the study are Argentina, Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Jamaica, Japan, Mexico, the Russian Federation, South Africa, South Korea, Turkey, the United Arab Emirates, United Kingdom, and the United States.
- 4 These multipliers have been devised from the analysis of input-output tables across the identified countries. The methodology allows comparable multipliers to be calculated across both sectors and countries. WTTC/Oxford Economics 2012.
- 5 This multiplier is calculated according to the overall structure of industries- comparing the number of employees for a given level of industry output/revenue generated. We do not differentiate between the source of original investment or demand. It may well be the case that publicly funded projects have a different structure and return than privately funded development. However, we do not seek to make that distinction and a similar effect could exist for all industries.
- 6 WTTC 2011.
- 7 Oxford Economics 2011.

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# Competitiveness, Jobs, and Green Growth: A “Glocal” Model

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This chapter details conceptual and operational research, led by the Victoria University Centre for Tourism and Services Research,<sup>1</sup> to create a system through which destinations can identify optimum green growth development scenarios for Travel & Tourism (T&T) in order to build wealth and create jobs in a sustainable manner.<sup>2</sup> Such a system seeks to take rapidly evolving, global socioeconomic concepts and strategies and provide a practical way to apply them to “base-of-the-pyramid” local development in a “glocal” model.<sup>3</sup> It shows the application of a major strategic vision conducted by the authors in a study undertaken for the government of Indonesia in 2012. It focuses on the research dimension of the vision and on how *The Travel & Tourism Competitiveness Report* could add value to the process. Finally, it outlines the econometric modeling process that is being developed to integrate competitiveness into the structure.

## BACKGROUND

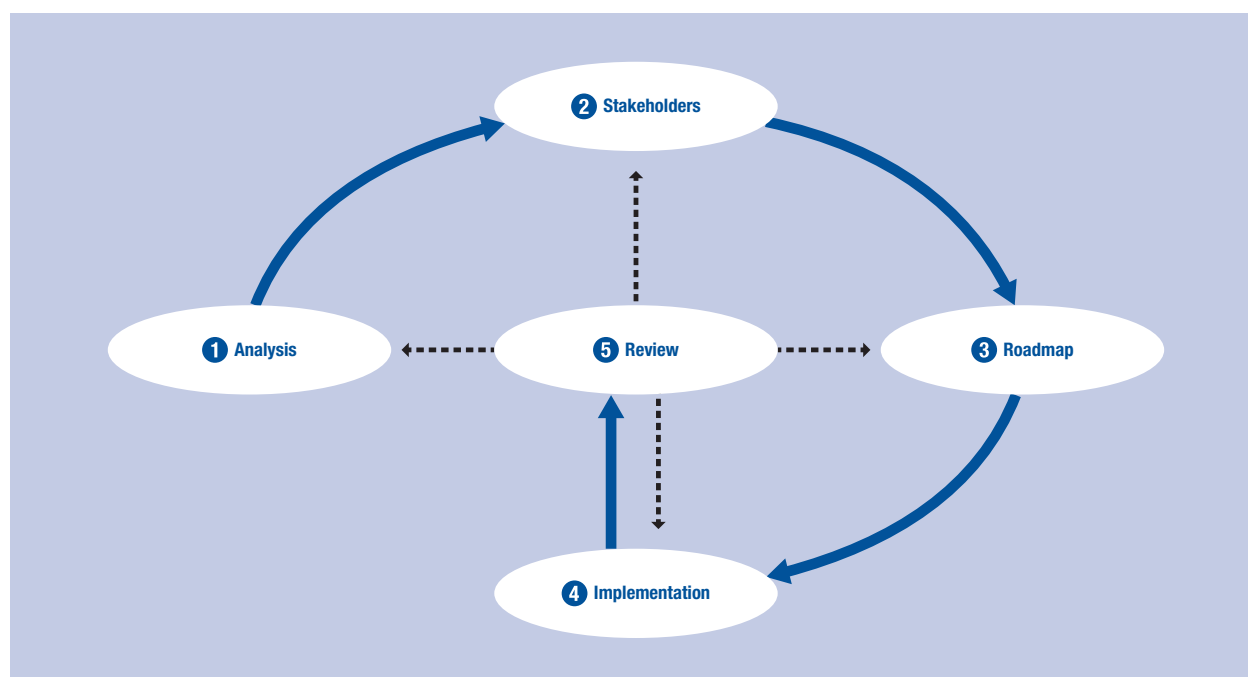
For some years, the idea of green growth has been gaining traction in national, regional, and global socio-political strategies, as has the view that Travel & Tourism is a major contributor to the growth of jobs, gross domestic product, and—particularly—development. Significant examples include the following:

- The G-20 Mexico Summit in June 2012 highlighted these issues in its Final Declaration and the Los Cabos Growth and Action Plan, noting:

We commit to continue to help developing countries sustain and strengthen their development through appropriate measures, including those that encourage inclusive green growth. . . . we commit to maintaining a focus on inclusive green growth as part of our G20 agenda and in the light of agreements reached at Rio+20 and the United Nations Framework Convention on Climate Change (UNFCCC). . . . We highlight that green growth and sustainable development have strong potential to stimulate long-term prosperity and well-being. . . . We recognize the role of travel and tourism as a vehicle for job creation, economic growth and development, and, while recognizing the sovereign right of States to control the entry of foreign nationals, we will work towards developing travel facilitation initiatives in support of job creation, quality work, poverty reduction and global growth.<sup>4</sup>

- The UN General Assembly passed a resolution in December 2012, entitled “Promotion of Ecotourism for Poverty Eradication and Environment Protection,” which calls on UN Member States to adopt policies that promote ecotourism, highlighting its “positive impact on income generation, job creation, and education, and thus on the fight against poverty and hunger.”<sup>5</sup>

Figure 1: Green Growth 2050 Roadmap stages



Note: Details for (1) Analysis can be found in Figure 4; details for (2) Stakeholders can be found in Figure 2; details for (3) Roadmap can be found in Figure 3; and details for (4) Implementation can be found in Figure 5.

- China—which is likely to have the largest domestic, inbound, and outbound travel markets in the world by 2015—has made tourism a strategic pillar of the economy and identified it as a vital engine of consumption in its most recent five-year development plan. This plan is the first time that China has decisively moved its economy onto a green growth path. “China’s 12th Five-Year Plan has outlined massive investments in environmental protection and green growth,” says European Council President Herman Van Rompuy.<sup>6</sup>

## ACTIONS

In order to translate these ideas into practical T&T operational possibilities, the Victoria University Centre for Tourism and Services Research has undertaken a number of interrelated actions under the direction of the authors, increasingly in collaboration with other academic institutions.

### Green Growth and Travelism

First, in a volume released at the Rio+20 Earth Summit, we formally identified a conceptual framework for green growth and travelism. This work states that governments, industry, and civil society around the world are urgently focusing on green growth as the best strategy to overcome economic free-fall, pervasive climate change, basic resource depletion, rapidly increasing populations and debilitating poverty. The aim of green growth is to create a fairer, happier society, based on renewable energy, web dynamics, social inclusion, and biodiversity conservation—with global temperature stabilization

by 2050 through green transformation of production, consumption, and investment. Travelism—the entire customer, company, community value chain—can play a much more significant role in this transformation.<sup>7</sup>

In this work, we engaged some 50 thought leaders from around the world, both inside and outside the sector, to comment on its relevance and direction. Among these leaders were those who manufacture aircraft, campaign for civil society, and explore futures; heads of governments, ministries, and international agencies; those who shape transport, trade, development, and capacity-building policies; those who run airlines, hotels, trains, cruise ships, convention centers, and national parks; those who provide Internet information as well as the software that runs it; and those who teach and train.

All of these leaders have quite different perspectives and interests, but they share a vision that the most-sought-after human economic activity on the planet—travel—can seriously help in the transformation of our world to a cleaner, greener, fairer future. Many ideas about what Travel & Tourism needs to do to play a key role in societal change, and to shape it in a positive way, are currently being considered. Among these are new transport platforms, networks, and bio-fuels; new climate-proofed hotel design and construction; new green models for business meetings; new tactics for community engagement that are centered on the base of the pyramid; new approaches to financing and investment; new visions for education and training; and new, more coherent, institutional arrangements. The stakes are high, both in terms of the future of our

planet and also economically: hundreds of trillions of transformation dollars are going to be spent, and the big question is who pays and how.

For example, Maurice Strong, a key architect of sustainable development, is calling for a tougher T&T green agenda with real action, targets, and measurement. The prime minister of Bhutan identifies the T&T sector as a key potential contributor to his concept of Gross National Happiness. Tom Enders, the chief executive officer of EADS (the parent of Airbus), is calling for a paradigm rethinking education and financing the future. Marthinus van Schalkwyk, the tourism minister of South Africa, discusses the breaking out of the subsector silos to mainstream Travel & Tourism in central policymaking. Sir Richard Branson, chairman of the Virgin Group, shares his views on how we can have a carbon-clean air transport sector in 10 years. Tony Tyler, the director general of the International Air Transport Association (IATA), considers the central role of connectivity in the travelism value chain. And Taleb Rifai, secretary general of the World Tourism Organization (UNWTO), explains the potential of a billion sustainability-minded travelers.

These ideas will form the basis for a continuing academic and policy evaluation around the intersections of green growth and travelism. A particular focus should be placed on education and training, where there is a massive untapped potential and a real opportunity to change mindsets. Through education and training we can move to a more sustainable path and develop future generations of transformation-inspired leaders. This focus on education applies to industry employees, destination residents engaged in the visitor economy, community decision makers, and travelers themselves.<sup>8</sup>

### Destination-focused evaluations

Second, in a series of destination-focused evaluations in Africa, Asia, the Pacific and the Caribbean, over the past five years we have been developing a comprehensive framework to bring the global concept of green growth and travelism to the local level.<sup>9</sup> In 2012, this work culminated in a major green growth and travelism-based study of Bali, Indonesia. The study was conducted with local partners for the Minister of Tourism and Creative Economy in Indonesia and the Provincial Governor of Bali.<sup>10</sup>

The resultant Green Growth 2050 Roadmap is a model for this type of approach. It has five distinct phases (Figure 1):

1. Mapping and projecting forward the “visitor economy”
2. Stakeholder engagement and analysis
3. Development of the roadmap
4. Implementation cluster
5. Annual review and course correction

Starting with basic desk and field research, we mapped and modeled the Bali visitor economy in an intensive data-gathering and forecasting exercise. We used international and nationally published economic, trade, development, and environment statistics. Host and visitor surveys formed an integral part of this model. We used forecasting and scenario modeling techniques to create a range of projected environmental, economic, community, travel, industrial, and service alternative futures.

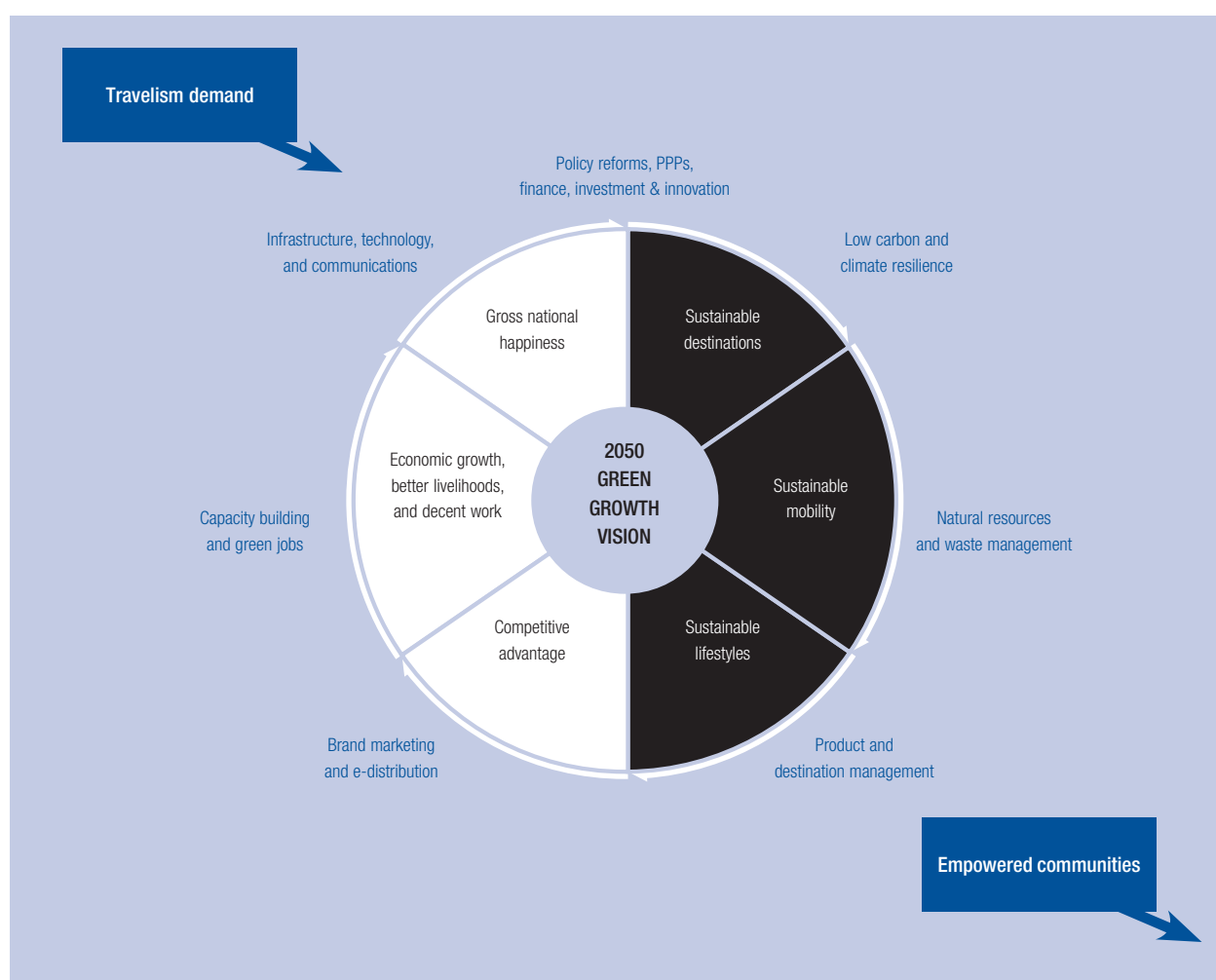
This was followed by in-depth stakeholder visioning sessions that took place in two intensive workshops with some 70 local public, private, and civil society representatives. These sessions considered a wide range of destination needs, including the roles to be played by low-carbon goals and climate resilience; natural resources and waste management; product and destination management; brand marketing and e-distribution; capacity building and green jobs; infrastructure, technology, and communications; and policy reforms, public-private partnerships, finance and investment, and innovation (Figure 2).

These visioning sessions led to the formulation of a structured, bottom-up strategy following best-practice patterns and governance demands, with measurable key performance indicators such as human development, visitor yield, and reduced greenhouse gas emissions. The process built on a community-led, sustainable development and authenticity base by considering strategy factors such as climate, environment, community well-being, jobs, products, markets, infrastructure, and investment. These strategic factors were then framed into a green growth roadmap for 2050 (Figure 3 shows this roadmap for Bali).

Although the strategies have a core goal of greenhouse gas reduction, in line with national commitments, they also considered the enhancement of environments and ecosystems generally, and factored in economic and cultural imperatives within the destination. Other vital considerations included the changing and greening of market demand (i.e., green consumerism), supply chain dynamics, destination competitiveness, brand positioning, and traditional as well as new funding options. Specific policies, actions, and timelines were detailed in each of the key strategic areas.

It is important to emphasize that stakeholders in the value chain were engaged in the process from the outset. They included air, land, and water transport operators and accommodation owners, tour operators, and tourist attractions on the supply side; they also included tourists themselves on the demand side. Separate oversight by the local community and national governance was also a critical element for project control, as was our seminal partnership with a local university and local adviser.

Figure 2: A model for stakeholder engagement



Note: PPP = public-private partnership.

The development of the green growth roadmap for tourism should enhance the long-term competitiveness of destinations and the supporting industries. It must be compatible with national travel, transport, tourism, and trade strategies as well as carbon commitments. It must ensure that socioeconomic growth is inclusive and provides decent jobs. Ultimately, it must bring about new demand and empower communities in the context of a broader balance sheet of societal well-being, including quality of life and environmental sustainability. In this context, carrying capacity and lifecycle analysis were pivotal. Overall, a green growth roadmap must deliver sustainable mobility, lifestyles, and communities.

The report and underlying research framework have been specifically developed to serve as a readily adaptable model green growth 2050 roadmap for Travel & Tourism (travelism) for any country, city, or community with a like-minded vision for green growth and travelism. It helps those who use the framework to:

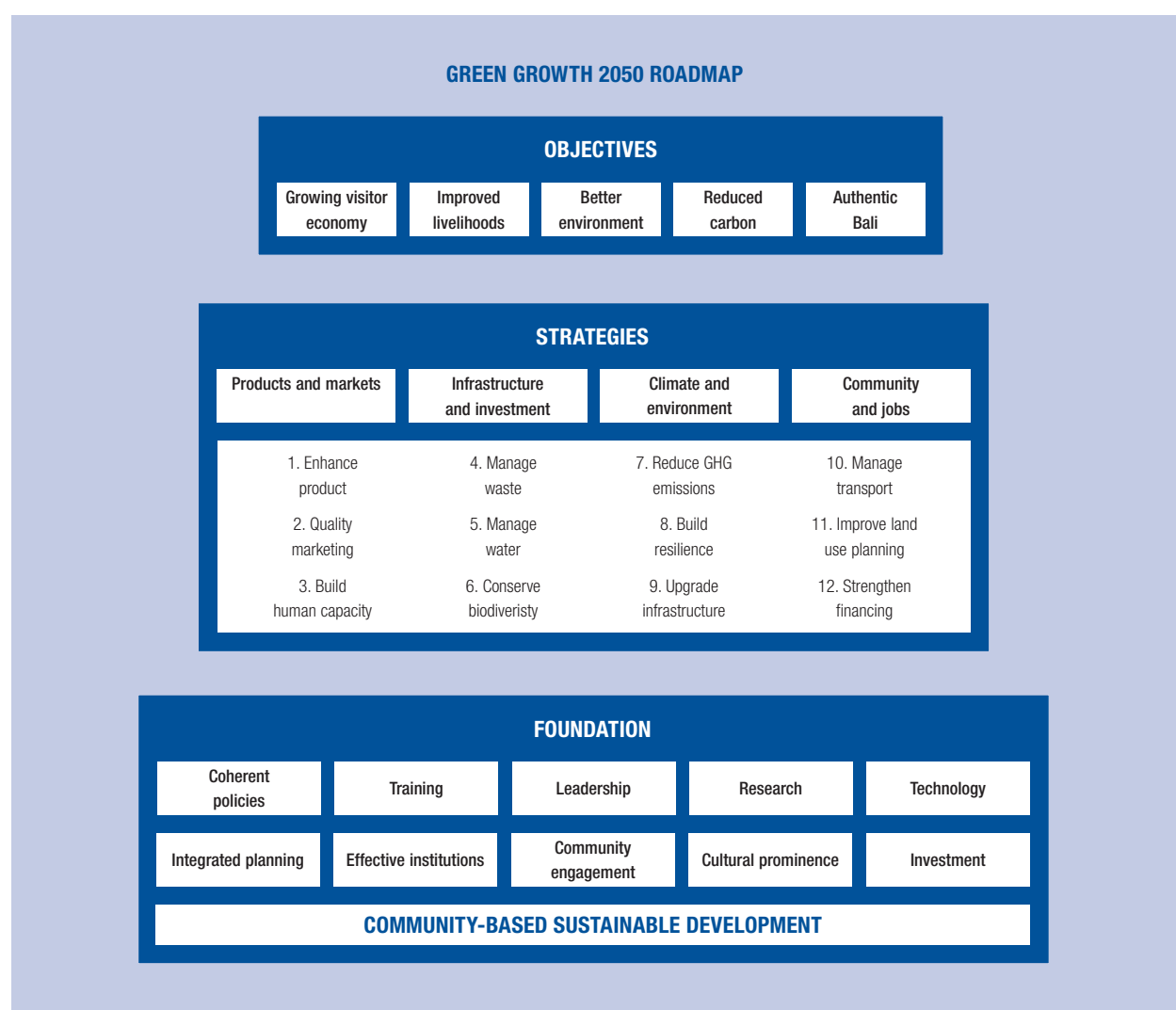
- respond effectively to a rapidly moving marketplace in very uncertain times;

- engage travelism in a transformation to a low-carbon, resource-efficient future;
- thoroughly assess trends to improve competitiveness and the overall visitor economy;
- handle increasing numbers of visitors and their impacts more sustainably;
- integrate travelism into overall community development, focusing on local livelihoods;
- engage local stakeholders and industry employees in the transformation;
- access global education and training programs for capacity building in the sector;
- consider new and traditional sources of funding to help with implementation; and
- routinely review progress and adjust to both planned and unplanned changes.

The framework allows any country, city, or community to consider these elements through an intensive scoping and visioning program that engages



Figure 3: The structure of green growth roadmap strategies for Bali



Note: GHG = greenhouse gas.

stakeholders at the core. It also provides a framework for integrating the evolution of global and national policy with local implementation (Figure 4).

We are building and refining a number of new tools to support this process. Our toolkit includes a coordinated resident and visitor survey model; a scenario design and decision option model; a structured stakeholder visioning framework; a strategy evaluation program; and the implementation of a cluster systems approach (Figure 5) that specifically uses Internet-based crowd-pacting techniques to fully engage potential investors, including visitors themselves;<sup>11</sup> and an annual course correction analysis.<sup>12</sup>

### Continuing GETS-led research

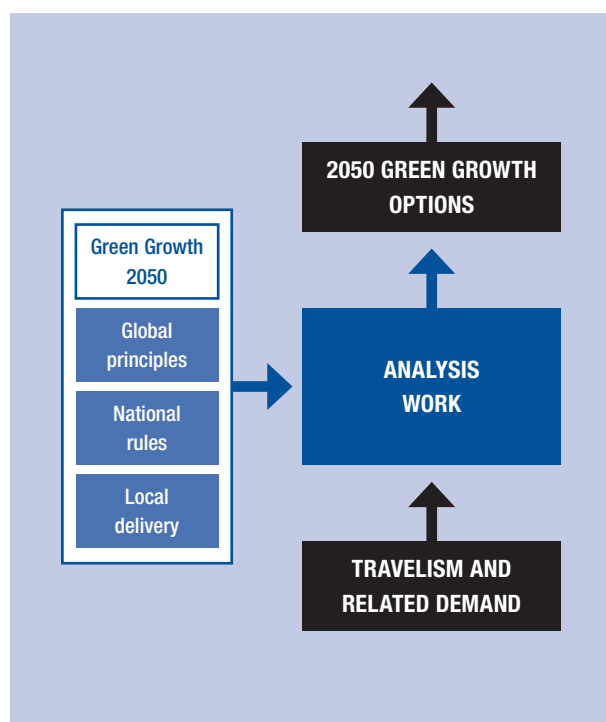
In a third interrelated action, we will continue to push the envelope forward in all these areas of green growth 2050 roadmapping by adding experience-based input from continuing studies and projects. However, our central and immediate research focus is on the green economy tourism system (GETS) modeling program. GETS has

the capacity to give communities a comprehensive and better decision-making framework, and hence provide an incentive for evaluating the green growth and travelism options.

The GETS model tests green growth and travelism options by integrating large and diverse datasets. It is designed to work in settings characterized by complexity and uncertainty, where limited data availability and an absence of existing frameworks hinder development of targeted, effective strategies.

GETS presents an approach for a decision-support system to assist destinations address challenges and opportunities in periods of rapid change while integrating its core requirement of low-carbon transformation. It incorporates the benchmark principles of sustainable tourism, destination management, competitiveness, and system dynamics. A key design factor of the GETS model is the capacity to support decision making for tourism destinations of varying sizes (from small locations within a country to transnational regions) and varying economic structures (from regions exclusively reliant on tourism to

Figure 4: Analysis



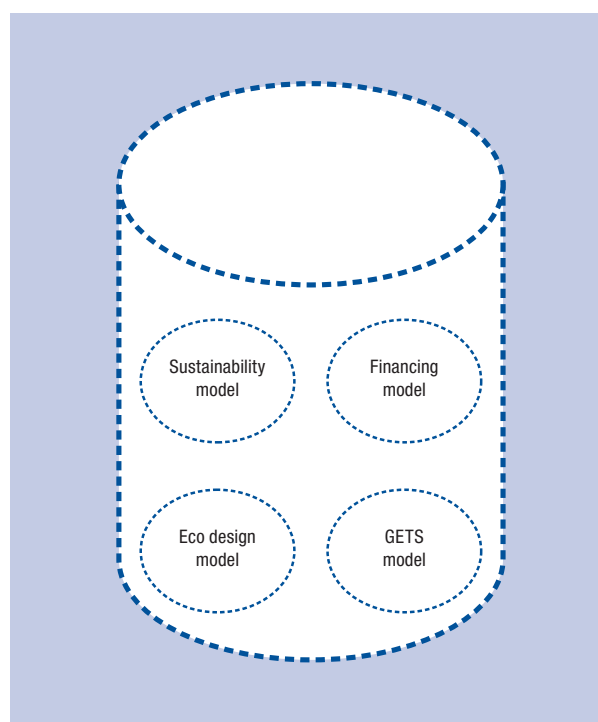
those where tourism is a major or even a minor industry) and varying composition (from a destination comprised of large, international, Western-style hotels and resorts to one with small individual businesses with a large number of ecotourism attractions and activities).

GETS does this by maintaining an ever-expanding series of databases of key elements. These include tourism volumes, expenditure patterns, and behaviors; high-level engineering analysis of the impact of various tourism activities on greenhouse gas production; and precedents and models of comparable tourism destinations around the world.

Although the system is strongly centered on systematic analysis and simulation of quantitative data, a key strength of GETS is its interactive scenario analysis. Using this technique, local tourism planners and decision makers can discuss various policy settings, input these into the model, and simulate their impact on the tourism in the region in terms of several key measures: the expected number of visitors; the amount each visitor spends; the amount of infrastructure, labor, and training required by the destination; and the amount of greenhouse gas produced. These different scenarios can then be analyzed to facilitate more informed long-term planning for the green growth 2050 roadmap against the quadruple bottom line of economic growth, cultural and social development, environmental factors, and climate change impacts.

As our field projects have developed, we have been able to refine techniques and processes. For example, in Australia we were able to integrate the two major national

Figure 5: Implementation



tourism databases: the International Visitor Survey (which provides data on international visitors) and the National Visitor Survey (which provides data on residents holidaying in Australia) with the national census statistics (which considers the resident population). Combined surveys can provide a key insight into tourism activities in local areas with relatively higher confidence levels than that provided by the International Visitor Survey or the National Visitor Survey alone. Each of these databases has more than 1 million records with up to 1,700 variables. Data quality has been further enhanced by overlaying Australian Bureau of Statistics data on hotel and motel accommodation performance.

The GETS model can integrate a wide variety of local geographic-based data, such as road traffic counts; the volume of liquid and solid waste generated by an area; and the population's level of literacy, household wages, and life expectancy, (among others). Therefore this approach can provide stakeholders with additional insight into the *relative* performance of local townships, settlements, and villages within a regional geography or between different subsectors of a region, or along a coastline, major road, or tourism circuit.<sup>13</sup>

The GETS model integrates databases from government, nongovernmental organizations, and businesses, as well as from travelism and other sources, while at the same time maintaining the inherent integrity and confidentiality of each database. This provides a basis for a wide range of data analyses—from big data to macro or micro data analyses—and scenario developments. At the assessment level, we

use transformational analytics, which allows us to expand and extend relevant datasets for econometrics, forecasting, and statistics, as well as combining them in multiple ways, using perfunctory measures of ratios, means, frequencies, cross tabulations, and so on, as well as using advanced multivariate techniques.

In its early stages, the GETS model was operated at a fairly basic manual level. However, the processes have become increasingly automated and current activity is focused on delivering a fully automated “high tech, high touch” system. This system will draw data from a wide array of public and private sources, especially online datasets such as those published by governments and major nongovernmental organizations. The advanced system dynamic modeling at the heart of GETS configures those data into strategically meaningful insights. This results in scenario options, in dashboard form, for user assessment and manipulation, allowing users to assess the local economy, investment, employment, resident and visitor satisfaction, the environment, greenhouse gas emissions, and so on.

As we construct the automated version, we are undertaking a proof-of-concept test on a discrete subset model showing the interrelationship among tourist arrivals, investment in infrastructure, and the impact of tourists on the labor market, the environment, and community attitudes. Here we are using investment as the major vector. We show how altering this key variable will affect the community, employment, and the environment. The results are available in various dashboard configurations.

### Working with the World Economic Forum

Finally, as a result of discussions in the World Economic Forum's Global Agenda Council (the Council),<sup>14</sup> we are exploring the potential for integrating data from *The Travel & Tourism Competitiveness Report* into this modeling process. The focus of the Global Agenda Council New Models of Travel & Tourism is currently concentrated primarily on the ability of the sector to generate employment. The Council would like to create a methodology to quantify the impact of new investments in the T&T sector in terms of job creation, both at the national level (a macro perspective) and at the company level (a micro perspective).

The Council is considering the Travel & Tourism Competitiveness Index and the indicators in *The Travel & Tourism Competitiveness Report* for possible measures of impacts. We are working with the Council to evaluate how this might be accomplished in the context and framework of GETS modeling. There is a clear correlation between the Index and tourism receipts, and we are exploring other potential data links that are relevant for employment. Among these are log linear and data envelope analysis of infrastructure, investment, competitiveness, and levels of employment, as well as

the Boston Matrix analysis of “quality” and “sustainability” of employment outcomes and transformational strategies.

### A LOOK TOWARD THE FUTURE

As this work evolves, we will be engaging with the Council and other travelism stakeholders doing similar work to test the concepts in key collaborating markets. In the broader context, we will keep our eye on the green growth and travelism dimension. We will ensure that the techniques used and correlations explored factor green growth into the outcomes of low-carbon linkages, smart border strategies, and green jobs.

### NOTES

- 1 Victoria University, Centre for Tourism and Services Research, Australia and Greenearth.travel, Belgium—also including Oxford Brookes University UK.
- 2 Lipman and Vorster 2011.
- 3 *Glocal* principles are those with specific local implementation approaches.
- 4 G20 Los Caberos Leaders Declaration, Mexico, June 2012.
- 5 UN General Assembly Resolution A/67/441, December 21, 2012.
- 6 Remarks of President of the European Council Herman Van Rompuy on China's Five-Year Development Plan. See Fu 2001.
- 7 Lipman et al. 2012.
- 8 A Green Growth and Travelism Institute has been established in Belgium with the support of the Province of Limburg to spearhead a global network of universities committed to advancing this conceptual framework and introducing it into graduate and postgraduate programs.
- 9 These evaluations took place in Sri Lanka—an *Earth Lung*, in 2007; in Sharm El Sheikh, Egypt in 2008; in the Turks and Caicos in 2009; and in Bali, Indonesia, in 2012.
- 10 Republic of Indonesia, Ministry of Tourism and Creative Economy 2012.
- 11 *Crowdpacting* is a specific form of crowdfunding that focuses on “impact investment,” namely for projects that contain a strong socially or environmentally responsible element.
- 12 See [www.greengrowth2050.com](http://www.greengrowth2050.com) and [www.gatetrip.com](http://www.gatetrip.com).
- 13 In a North Queensland project, for example, we were able to identify and quantify the relative tourism performance in three towns in the Atherton Shire, as well as a new tourism entity made up of townships located along the Kennedy Highway, which has tentatively been named the “Kennedy Tourist Route.”
- 14 Global Agenda Council for New Models of Travel & Tourism. Dubai 2012.

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# Part 2

## **Country/Economy Profiles and Data Presentation**



# 2.1

## Country/Economy Profiles





# How to Read the Country/Economy Profiles

This section presents two-page profiles for all the 140 economies included in *The Travel & Tourism Competitiveness Report 2013*.

## LEFT-HAND PAGE

### 1 Key indicators

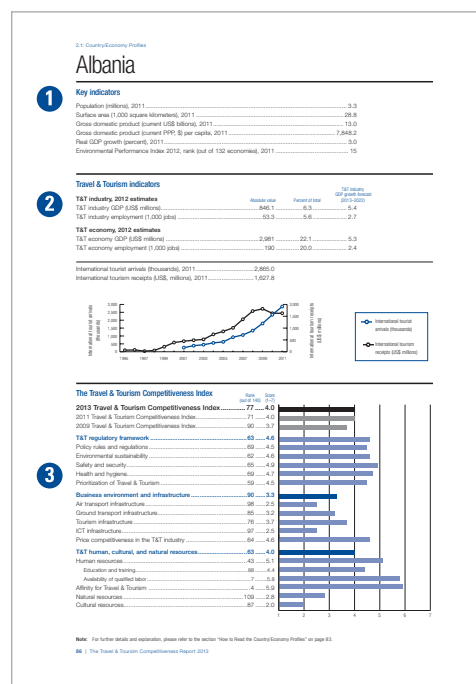
The first section presents several key indicators that give a sense of the size of the country and its economy. Population and surface area figures are from the World Bank's *World Development Indicators Online Database* (December 2012). GDP numbers are from the International Monetary Fund (IMF)'s *World Economic Outlook Database* (October 2012 edition). The Environmental Performance Index rankings are from YCELP, Yale University and CIESIN, Columbia University. National sources have been consulted where appropriate.

### 2 Travel & Tourism indicators

The second section presents Travel & Tourism (T&T) indicators that aim to provide a measure of the past, current, and projected future activity of Travel & Tourism in each economy. This section is in turn split into two parts:

The first part includes data from the Tourism Satellite Accounting Research carried out annually by the World Travel & Tourism Council (WTTC) and the second part includes data on international tourist arrivals and international tourism receipts over the period 1995 to 2011 provided by the World Tourism Organization (UNWTO). The graph shows all the available data for tourism arrivals and receipts during this period for each economy.

Developed by the UNWTO, the Organisation for Economic Co-operation and Development (OECD), and Eurostat, the Tourism Satellite Accounting (TSA) framework is a statistical tool—including concepts, definitions, aggregates, classifications, and tables—that is compatible with international national accounting guidelines and allows for valid international comparisons. The TSA also makes these estimates comparable with other internationally recognized macroeconomic aggregates and compilations. Using the TSA approach, WTTC estimates the current and projected future



economic contribution of Travel & Tourism in terms of an economy's GDP and employment.

WTTC defines the T&T sector in two ways: More narrowly, T&T activity—defined as the T&T industry—captures the production-side industry contribution (that is, its direct impact only). A second, broader definition of the T&T economy takes into consideration the direct as well as the indirect contributions by traditional travel service providers and industry suppliers within the resident economy. This latter perspective is used when one wants to understand the total impact of Travel & Tourism on the resident economy. More information regarding WTTC's TSA Research, along with details on the methodology and data, are available at [http://www.wttc.org/eng/Tourism\\_Research/](http://www.wttc.org/eng/Tourism_Research/).

The number of **international tourist arrivals**, expressed in thousands, is the most common unit of measure used to quantify the volume of international tourism for statistical purposes. It includes exclusively overnight visitors—that is, tourists who stay at least one night in a collective or private accommodation in the country visited. Same-day visitors are not included. The number of arrivals does not necessarily correspond to the number of persons. The same person who makes



# Index of Country/Economy Profiles

Country/Economy	Page	Country/Economy	Page	Country/Economy	Page	Country/Economy	Page
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Dominican Republic	154	Latvia	224	Qatar	294	Zimbabwe	364

# Albania

## Key indicators

Population (millions), 2011 .....	3.3
Surface area (1,000 square kilometers), 2011 .....	28.8
Gross domestic product (current US\$ billions), 2011 .....	13.0
Gross domestic product (current PPP, \$) per capita, 2011 .....	7,848.2
Real GDP growth (percent), 2011 .....	3.0
Environmental Performance Index 2012, rank (out of 132 economies), 2011 .....	15

## Travel & Tourism indicators

### T&T industry, 2012 estimates

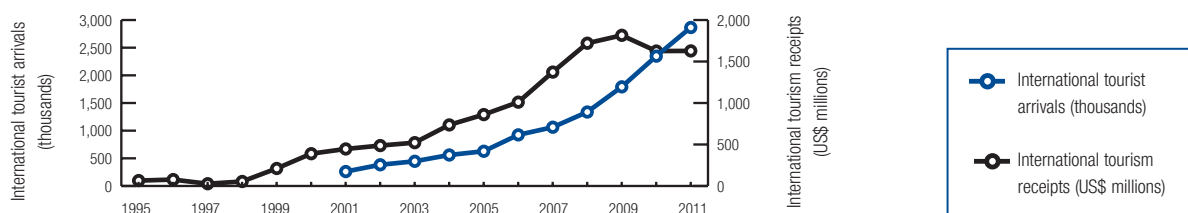
	Absolute value	Percent of total	T&T industry GDP growth forecast (2013–2022)
T&T industry GDP (US\$ millions).....	846.1	6.3	5.4
T&T industry employment (1,000 jobs) .....	53.3	5.6	2.7

### T&T economy, 2012 estimates

T&T economy GDP (US\$ millions) .....	2,981	22.1	5.3
T&T economy employment (1,000 jobs) .....	190	20.0	2.4

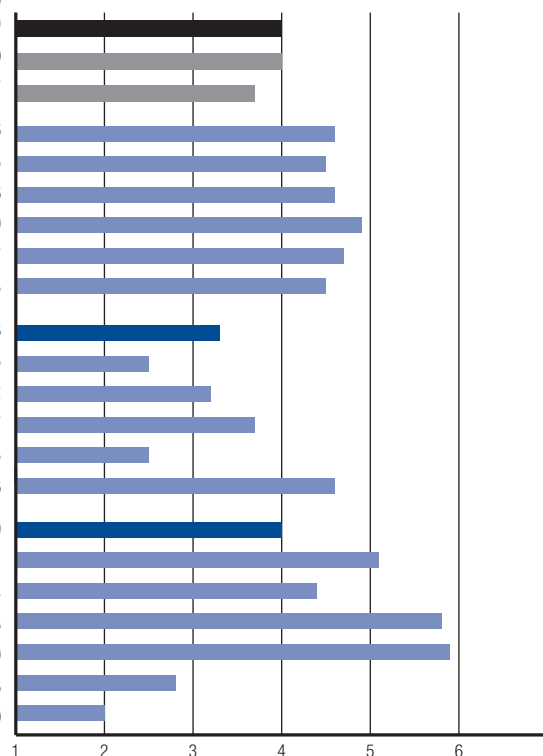
International tourist arrivals (thousands), 2011 .....2,865.0

International tourism receipts (US\$, millions), 2011 .....1,627.8



## The Travel & Tourism Competitiveness Index

	Rank (out of 140)	Score (1–7)
<b>2013 Travel &amp; Tourism Competitiveness Index.....</b>	<b>77</b>	<b>4.0</b>
2011 Travel & Tourism Competitiveness Index.....	71	4.0
2009 Travel & Tourism Competitiveness Index.....	90	3.7
<b>T&amp;T regulatory framework .....</b>	<b>63</b>	<b>4.6</b>
Policy rules and regulations .....	69	4.5
Environmental sustainability .....	62	4.6
Safety and security.....	65	4.9
Health and hygiene.....	69	4.7
Prioritization of Travel & Tourism .....	59	4.5
<b>Business environment and infrastructure .....</b>	<b>90</b>	<b>3.3</b>
Air transport infrastructure .....	98	2.5
Ground transport infrastructure.....	85	3.2
Tourism infrastructure .....	76	3.7
ICT infrastructure .....	97	2.5
Price competitiveness in the T&T industry .....	64	4.6
<b>T&amp;T human, cultural, and natural resources.....</b>	<b>63</b>	<b>4.0</b>
Human resources .....	43	5.1
Education and training.....	88	4.4
Availability of qualified labor.....	7	5.8
Affinity for Travel & Tourism .....	4	5.9
Natural resources .....	109	2.8
Cultural resources.....	87	2.0



**Note:** For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" on page 83.

## Albania

## The Travel &amp; Tourism Competitiveness Index in detail

INDICATOR	SCORE	RANK	INDICATOR	SCORE	RANK
<b>1st pillar: Policy rules and regulations ..... 4.5 ..... 69</b>			<b>8th pillar: Tourism infrastructure ..... 3.7 ..... 76</b>		
1.01 Prevalence of foreign ownership ..... 4.1 ..... 101			8.01 Hotel rooms/100 pop.* ..... 0.3 ..... 83		
1.02 Property rights ..... 3.1 ..... 126			8.02 Presence of major car rental co. (1–7)* ..... 6 ..... 32		
1.03 Business impact of rules on FDI ..... 4.7 ..... 65			8.03 ATMs accepting Visa cards/million pop.* ..... 223.3 ..... 80		
1.04 Visa requirements, no. of countries* ..... 58.0 ..... 102					
1.05 Openness bilateral ASAs (0–38)* ..... 10.9 ..... 71			<b>9th pillar: ICT infrastructure ..... 2.5 ..... 97</b>		
1.06 Transparency of government policymaking ..... 4.3 ..... 65			9.01 ICT use for B-to-B transactions ..... n/a ..... n/a		
1.07 No. of days to start a business* ..... 4 ..... 8			9.02 ICT use for B-to-C transactions ..... n/a ..... n/a		
1.08 Cost to start a business, % GNI/capita* ..... 22.1 ..... 101			9.03 Individuals using the Internet, %* ..... 49.0 ..... 57		
1.09 GATS commitment restrictiveness (0–100)* ..... 84.9 ..... 7			9.04 Fixed telephone lines/100 pop.* ..... 10.5 ..... 90		
			9.05 Broadband Internet subscribers/100 pop.* ..... 4.0 ..... 83		
<b>2nd pillar: Environmental sustainability ..... 4.6 ..... 62</b>			9.06 Mobile telephone subscriptions/100 pop.* ..... 96.4 ..... 88		
2.01 Stringency of environmental regulation ..... 2.9 ..... 127			9.07 Mobile broadband subscriptions/100 pop.* ..... 8.8 ..... 78		
2.02 Enforcement of environmental regulation ..... 2.6 ..... 130					
2.03 Sustainability of T&T industry development ..... 4.2 ..... 78			<b>10th pillar: Price competitiveness in T&amp;T ind. .... 4.6 ..... 64</b>		
2.04 Carbon dioxide emission, million tons/capita* ..... 1.3 ..... 43			10.01 Ticket taxes and airport charges (0–100)* ..... 70.0 ..... 102		
2.05 Particulate matter concentration, µg/m <sup>3</sup> * ..... 36.5 ..... 86			10.02 Purchasing power parity* ..... 0.5 ..... 22		
2.06 Threatened species, %* ..... 2.8 ..... 26			10.04 Fuel price, US\$ cents/liter* ..... 140.0 ..... 98		
2.07 Environm. treaty ratification (0–25)* ..... 20 ..... 53			10.03 Extent and effect of taxation ..... 3.9 ..... 40		
			10.05 Hotel price index, US\$* ..... 127.0 ..... 56		
<b>3rd pillar: Safety and security ..... 4.9 ..... 65</b>					
3.01 Business costs of crime and violence ..... 4.7 ..... 78			<b>11th pillar: Human resources ..... 5.1 ..... 43</b>		
3.02 Reliability of police services ..... 4.0 ..... 77			<i>Education and training</i> ..... 4.4 ..... 88		
3.03 Road traffic accidents/100,000 pop.* ..... 13.9 ..... 55			11.01 Primary education enrollment, net %* ..... 79.9 ..... 123		
3.04 Business costs of terrorism ..... 5.6 ..... 67			11.02 Secondary education enrollment, gross %* ..... 88.9 ..... 68		
			11.03 Quality of the educational system ..... 4.0 ..... 52		
<b>4th pillar: Health and hygiene ..... 4.7 ..... 69</b>			11.04 Local availability specialized research & training... 3.3 ..... 117		
4.01 Physician density/1,000 pop.* ..... 1.2 ..... 85			11.05 Extent of staff training ..... 4.4 ..... 36		
4.02 Access to improved sanitation, % pop.* ..... 94.0 ..... 58			<i>Availability of qualified labor</i> ..... 5.8 ..... 7		
4.03 Access to improved drinking water, % pop.* ..... 95.0 ..... 70			11.06 Hiring and firing practices ..... 4.7 ..... 26		
4.04 Hospital beds/10,000 pop.* ..... 28.0 ..... 66			11.07 Ease of hiring foreign labor ..... 5.5 ..... 3		
			11.08 HIV prevalence, % adult pop.* ..... n/a ..... 1		
<b>5th pillar: Prioritization of Travel &amp; Tourism ..... 4.5 ..... 59</b>			11.09 Business impact of HIV/AIDS ..... 6.6 ..... 4		
5.01 Government prioritization of the T&T industry ..... 5.2 ..... 69			11.10 Life expectancy, years* ..... 77.0 ..... 38		
5.02 T&T gov't expenditure, % gov't budget* ..... 3.9 ..... 57					
5.03 Effectiveness of marketing to attract tourists ..... 4.5 ..... 61			<b>12th pillar: Affinity for Travel &amp; Tourism ..... 5.9 ..... 4</b>		
5.04 Comprehensiveness of T&T data (0–120)* ..... 76.0 ..... 39			12.01 Tourism openness, % of GDP* ..... 24.6 ..... 5		
5.05 Timeliness of T&T data (0–18)* ..... 13.5 ..... 71			12.02 Attitude of population toward foreign visitors ..... 6.0 ..... 98		
			12.03 Extension of business trips recommended ..... 5.6 ..... 54		
<b>6th pillar: Air transport infrastructure ..... 2.5 ..... 98</b>			12.04 Degree of customer orientation ..... 5.0 ..... 38		
6.01 Quality of air transport infrastructure ..... 4.8 ..... 66					
6.02 Airline seat kms/week, dom., millions* ..... 0.0 ..... 105			<b>13th pillar: Natural resources ..... 2.8 ..... 109</b>		
6.03 Airline seat kms/week, int'l, millions* ..... 23.5 ..... 111			13.01 No. of World Heritage natural sites* ..... 0 ..... 79		
6.04 Departures/1,000 pop.* ..... 3.2 ..... 72			13.02 Quality of the natural environment ..... 3.5 ..... 117		
6.05 Airport density/million pop.* ..... 0.3 ..... 103			13.03 Total known species* ..... 393 ..... 103		
6.06 No. of operating airlines* ..... 13.0 ..... 97			13.04 Terrestrial biome protection (0–17%)* ..... 10.0 ..... 75		
6.07 International air transport network ..... 4.5 ..... 78			13.05 Marine protected areas, %* ..... 0.9 ..... 44		
<b>7th pillar: Ground transport infrastructure ..... 3.2 ..... 85</b>			<b>14th pillar: Cultural resources ..... 2.0 ..... 87</b>		
7.01 Quality of roads ..... 4.3 ..... 59			14.01 No. of World Heritage cultural sites* ..... 3 ..... 74		
7.02 Quality of railroad infrastructure ..... 1.2 ..... 117			14.02 Sports stadiums, seats/million pop.* ..... 55,037.5 ..... 47		
7.03 Quality of port infrastructure ..... 3.7 ..... 95			14.03 No. of int'l fairs and exhibitions* ..... 4.7 ..... 96		
7.04 Quality of ground transport network ..... 3.7 ..... 118			14.04 Creative industries exports, % of world total* ..... 0.0 ..... 90		
7.05 Road density/million pop.* ..... 63.0 ..... 48					

# Algeria

## Key indicators

Population (millions), 2011 .....	36.2
Surface area (1,000 square kilometers), 2011 .....	2,381.7
Gross domestic product (current US\$ billions), 2011 .....	197.9
Gross domestic product (current PPP, \$) per capita, 2011 .....	7,324.5
Real GDP growth (percent), 2011 .....	2.4
Environmental Performance Index 2012, rank (out of 132 economies), 2011 .....	86

## Travel & Tourism indicators

### T&T industry, 2012 estimates

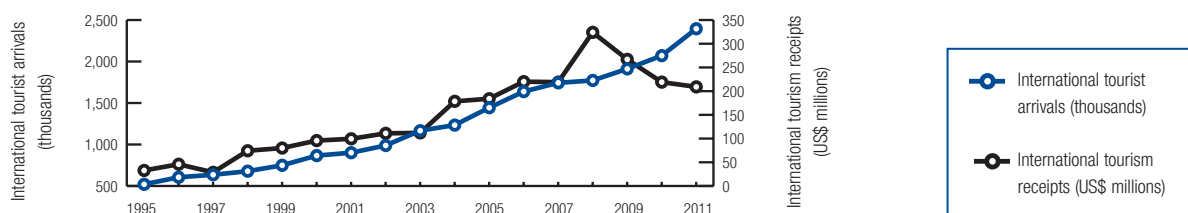
	Absolute value	Percent of total	T&T industry GDP growth forecast (2013–2022)
T&T industry GDP (US\$ millions).....	7,658.9	4.1	4.1
T&T industry employment (1,000 jobs) .....	377.3	3.7	2.8

### T&T economy, 2012 estimates

T&T economy GDP (US\$ millions) .....	14,727	7.9	4.6
T&T economy employment (1,000 jobs) .....	732	7.1	3.2

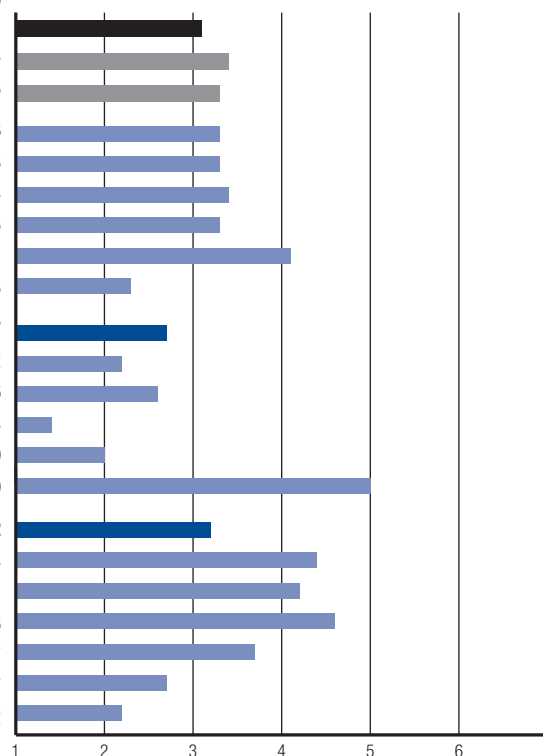
International tourist arrivals (thousands), 2011 .....2,394.9

International tourism receipts (US\$, millions), 2011 .....209.0



## The Travel & Tourism Competitiveness Index

	Rank (out of 140)	Score (1–7)
<b>2013 Travel &amp; Tourism Competitiveness Index.....</b>	<b>132</b>	<b>3.1</b>
2011 Travel & Tourism Competitiveness Index.....	113	3.4
2009 Travel & Tourism Competitiveness Index.....	115	3.3
<b>T&amp;T regulatory framework .....</b>	<b>134</b>	<b>3.3</b>
Policy rules and regulations .....	133	3.3
Environmental sustainability .....	136	3.4
Safety and security.....	132	3.3
Health and hygiene.....	90	4.1
Prioritization of Travel & Tourism .....	140	2.3
<b>Business environment and infrastructure .....</b>	<b>126</b>	<b>2.7</b>
Air transport infrastructure .....	115	2.2
Ground transport infrastructure.....	126	2.6
Tourism infrastructure .....	131	1.4
ICT infrastructure .....	115	2.0
Price competitiveness in the T&T industry .....	28	5.0
<b>T&amp;T human, cultural, and natural resources.....</b>	<b>123</b>	<b>3.2</b>
Human resources .....	103	4.4
Education and training.....	104	4.2
Availability of qualified labor.....	105	4.6
Affinity for Travel & Tourism .....	137	3.7
Natural resources .....	121	2.7
Cultural resources.....	74	2.2



**Note:** For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" on page 83.



# Algeria

## The Travel & Tourism Competitiveness Index in detail

INDICATOR	SCORE	RANK	INDICATOR	SCORE	RANK
<b>1st pillar: Policy rules and regulations ..... 3.3 ..... 133</b>			<b>8th pillar: Tourism infrastructure ..... 1.4 ..... 131</b>		
1.01 Prevalence of foreign ownership ..... 3.3 ..... 133			8.01 Hotel rooms/100 pop.* ..... 0.1 ..... 104		
1.02 Property rights ..... 2.5 ..... 136			8.02 Presence of major car rental co. (1–7)* ..... 1 ..... 123		
1.03 Business impact of rules on FDI ..... 3.2 ..... 134			8.03 ATMs accepting Visa cards/million pop.* ..... 1.8 ..... 136		
1.04 Visa requirements, no. of countries* ..... 11.0 ..... 130					
1.05 Openness bilateral ASAs (0–38)* ..... 6.3 ..... 122			<b>9th pillar: ICT infrastructure ..... 2.0 ..... 115</b>		
1.06 Transparency of government policymaking ..... 2.6 ..... 140			9.01 ICT use for B-to-B transactions ..... 2.7 ..... 135		
1.07 No. of days to start a business* ..... 25 ..... 96			9.02 ICT use for B-to-C transactions ..... 2.4 ..... 135		
1.08 Cost to start a business, % GNI/capita* ..... 12.1 ..... 79			9.03 Individuals using the Internet, %* ..... 14.0 ..... 109		
1.09 GATS commitment restrictiveness (0–100)* ..... n/a ..... n/a			9.04 Fixed telephone lines/100 pop.* ..... 8.5 ..... 97		
			9.05 Broadband Internet subscribers/100 pop.* ..... 2.8 ..... 88		
<b>2nd pillar: Environmental sustainability ..... 3.4 ..... 136</b>			9.06 Mobile telephone subscriptions/100 pop.* ..... 99.0 ..... 84		
2.01 Stringency of environmental regulation ..... 2.0 ..... 138			9.07 Mobile broadband subscriptions/100 pop.* ..... 0.0 ..... 128		
2.02 Enforcement of environmental regulation ..... 2.0 ..... 136					
2.03 Sustainability of T&T industry development ..... 2.3 ..... 138			<b>10th pillar: Price competitiveness in T&amp;T ind. .... 5.0 ..... 28</b>		
2.04 Carbon dioxide emission, million tons/capita* ..... 3.2 ..... 65			10.01 Ticket taxes and airport charges (0–100)* ..... 84.2 ..... 44		
2.05 Particulate matter concentration, µg/m <sup>3</sup> * ..... 74.8 ..... 124			10.02 Purchasing power parity* ..... 0.6 ..... 57		
2.06 Threatened species, %* ..... 6.5 ..... 97			10.04 Fuel price, US\$ cents/liter* ..... 19.0 ..... 5		
2.07 Environm. treaty ratification (0–25)* ..... 18 ..... 84			10.03 Extent and effect of taxation ..... 3.2 ..... 97		
			10.05 Hotel price index, US\$* ..... 177.2 ..... 96		
<b>3rd pillar: Safety and security ..... 3.3 ..... 132</b>					
3.01 Business costs of crime and violence ..... 3.6 ..... 115			<b>11th pillar: Human resources ..... 4.4 ..... 103</b>		
3.02 Reliability of police services ..... 3.0 ..... 117			<i>Education and training</i> ..... 4.2 ..... 104		
3.03 Road traffic accidents/100,000 pop.* ..... n/a ..... n/a			11.01 Primary education enrollment, net %* ..... 95.6 ..... 49		
3.04 Business costs of terrorism ..... 3.5 ..... 136			11.02 Secondary education enrollment, gross %* ..... 94.9 ..... 51		
			11.03 Quality of the educational system ..... 2.5 ..... 128		
<b>4th pillar: Health and hygiene ..... 4.1 ..... 90</b>			11.04 Local availability specialized research & training ..... 2.8 ..... 136		
4.01 Physician density/1,000 pop.* ..... 1.2 ..... 82			11.05 Extent of staff training ..... 2.6 ..... 138		
4.02 Access to improved sanitation, % pop.* ..... 95.0 ..... 52			<i>Availability of qualified labor</i> ..... 4.6 ..... 105		
4.03 Access to improved drinking water, % pop.* ..... 83.0 ..... 106			11.06 Hiring and firing practices ..... 3.3 ..... 109		
4.04 Hospital beds/10,000 pop.* ..... 17.0 ..... 92			11.07 Ease of hiring foreign labor ..... 3.0 ..... 132		
			11.08 HIV prevalence, % adult pop.* ..... 0.1 ..... 12		
<b>5th pillar: Prioritization of Travel &amp; Tourism ..... 2.3 ..... 140</b>			11.09 Business impact of HIV/AIDS ..... 5.3 ..... 69		
5.01 Government prioritization of the T&T industry ..... 3.0 ..... 138			11.10 Life expectancy, years* ..... 73.1 ..... 81		
5.02 T&T gov't expenditure, % gov't budget* ..... 1.1 ..... 128					
5.03 Effectiveness of marketing to attract tourists ..... 2.2 ..... 139			<b>12th pillar: Affinity for Travel &amp; Tourism ..... 3.7 ..... 137</b>		
5.04 Comprehensiveness of T&T data (0–120)* ..... 40.0 ..... 115			12.01 Tourism openness, % of GDP* ..... 0.4 ..... 138		
5.05 Timeliness of T&T data (0–18)* ..... 3.0 ..... 112			12.02 Attitude of population toward foreign visitors ..... 6.1 ..... 94		
			12.03 Extension of business trips recommended ..... 4.6 ..... 118		
<b>6th pillar: Air transport infrastructure ..... 2.2 ..... 115</b>			12.04 Degree of customer orientation ..... 3.0 ..... 140		
6.01 Quality of air transport infrastructure ..... 3.3 ..... 123					
6.02 Airline seat kms/week, dom., millions* ..... 21.9 ..... 43			<b>13th pillar: Natural resources ..... 2.7 ..... 121</b>		
6.03 Airline seat kms/week, int'l, millions* ..... 129.1 ..... 72			13.01 No. of World Heritage natural sites* ..... 1 ..... 45		
6.04 Departures/1,000 pop.* ..... 1.2 ..... 94			13.02 Quality of the natural environment ..... 2.8 ..... 129		
6.05 Airport density/million pop.* ..... 0.8 ..... 58			13.03 Total known species* ..... 434 ..... 86		
6.06 No. of operating airlines* ..... 20.0 ..... 80			13.04 Terrestrial biome protection (0–17%)* ..... 6.3 ..... 96		
6.07 International air transport network ..... 3.2 ..... 137			13.05 Marine protected areas, %* ..... 0.1 ..... 87		
<b>7th pillar: Ground transport infrastructure ..... 2.6 ..... 126</b>			<b>14th pillar: Cultural resources ..... 2.2 ..... 74</b>		
7.01 Quality of roads ..... 3.4 ..... 87			14.01 No. of World Heritage cultural sites* ..... 8 ..... 33		
7.02 Quality of railroad infrastructure ..... 2.0 ..... 88			14.02 Sports stadiums, seats/million pop.* ..... 17,092.7 ..... 95		
7.03 Quality of port infrastructure ..... 2.7 ..... 129			14.03 No. of int'l fairs and exhibitions* ..... 4.3 ..... 102		
7.04 Quality of ground transport network ..... 3.8 ..... 111			14.04 Creative industries exports, % of world total* ..... 0.0 ..... 126		
7.05 Road density/million pop.* ..... 5.0 ..... 127					

# Argentina

## Key indicators

Population (millions), 2011 .....	41.8
Surface area (1,000 square kilometers), 2011 .....	2,780.4
Gross domestic product (current US\$ billions), 2011 .....	444.6
Gross domestic product (current PPP, \$) per capita, 2011 .....	17,659.5
Real GDP growth (percent), 2011 .....	8.9
Environmental Performance Index 2012, rank (out of 132 economies), 2011 .....	50

## Travel & Tourism indicators

### T&T industry, 2012 estimates

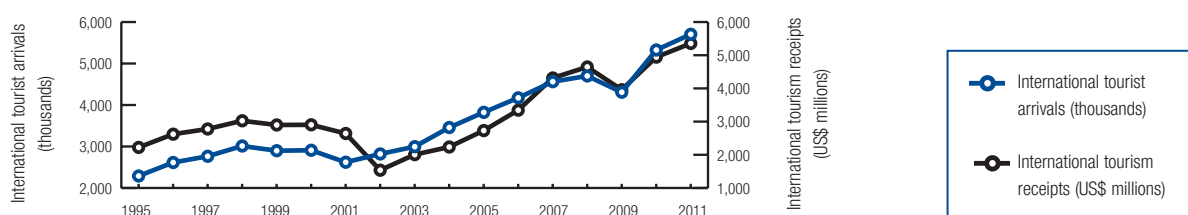
	Absolute value	Percent of total	T&T industry GDP growth forecast (2013–2022)
T&T industry GDP (US\$ millions) .....	17,174.9	3.8	4.0
T&T industry employment (1,000 jobs) .....	649.5	3.6	2.8

### T&T economy, 2012 estimates

T&T economy GDP (US\$ millions) .....	47,380	10.5	3.8
T&T economy employment (1,000 jobs) .....	1,763	9.9	2.5

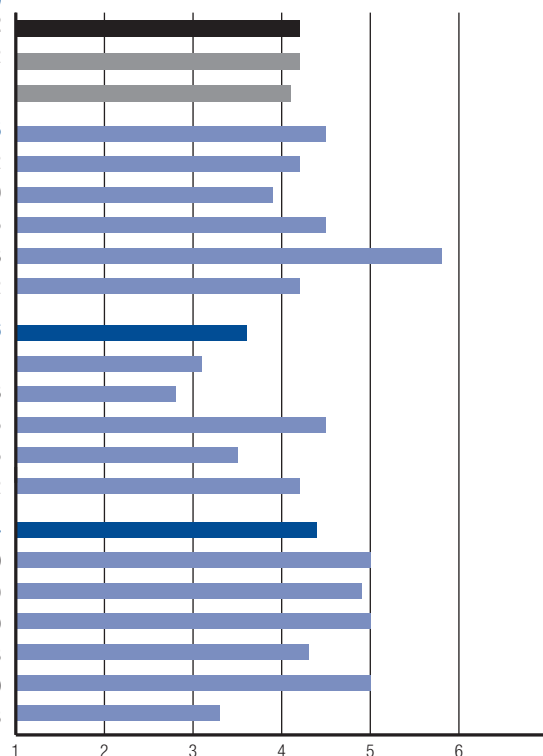
International tourist arrivals (thousands), 2011 ..... 5,704.6

International tourism receipts (US\$, millions), 2011 ..... 5,355.0



## The Travel & Tourism Competitiveness Index

	Rank (out of 140)	Score (1–7)
<b>2013 Travel &amp; Tourism Competitiveness Index .....</b>	<b>61</b>	<b>4.2</b>
2011 Travel & Tourism Competitiveness Index .....	60	4.2
2009 Travel & Tourism Competitiveness Index .....	65	4.1
<b>T&amp;T regulatory framework .....</b>	<b>69</b>	<b>4.5</b>
Policy rules and regulations .....	97	4.2
Environmental sustainability .....	123	3.9
Safety and security .....	81	4.5
Health and hygiene .....	44	5.8
Prioritization of Travel & Tourism .....	81	4.2
<b>Business environment and infrastructure .....</b>	<b>72</b>	<b>3.6</b>
Air transport infrastructure .....	66	3.1
Ground transport infrastructure .....	120	2.8
Tourism infrastructure .....	55	4.5
ICT infrastructure .....	56	3.5
Price competitiveness in the T&T industry .....	101	4.2
<b>T&amp;T human, cultural, and natural resources .....</b>	<b>41</b>	<b>4.4</b>
Human resources .....	57	5.0
Education and training .....	56	4.9
Availability of qualified labor .....	75	5.0
Affinity for Travel & Tourism .....	107	4.3
Natural resources .....	20	5.0
Cultural resources .....	44	3.3



**Note:** For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" on page 83.

# Argentina

## The Travel & Tourism Competitiveness Index in detail

INDICATOR	SCORE	RANK	INDICATOR	SCORE	RANK
<b>1st pillar: Policy rules and regulations ..... 4.2 ..... 97</b>			<b>8th pillar: Tourism infrastructure ..... 4.5 ..... 55</b>		
1.01 Prevalence of foreign ownership ..... 4.9 ..... 57			8.01 Hotel rooms/100 pop.* ..... 0.6 ..... 55		
1.02 Property rights ..... 2.6 ..... 132			8.02 Presence of major car rental co. (1–7)* ..... 7 ..... 1		
1.03 Business impact of rules on FDI ..... 2.7 ..... 138			8.03 ATMs accepting Visa cards/million pop.* ..... 290.5 ..... 69		
1.04 Visa requirements, no. of countries* ..... 81.0 ..... 50					
1.05 Openness bilateral ASAs (0–38)* ..... 16.1 ..... 25			<b>9th pillar: ICT infrastructure ..... 3.5 ..... 56</b>		
1.06 Transparency of government policymaking ..... 3.2 ..... 133			9.01 ICT use for B-to-B transactions ..... 4.8 ..... 84		
1.07 No. of days to start a business* ..... 26 ..... 98			9.02 ICT use for B-to-C transactions ..... 4.6 ..... 65		
1.08 Cost to start a business, % GNI/capita* ..... 12.3 ..... 80			9.03 Individuals using the Internet, %* ..... 47.7 ..... 60		
1.09 GATS commitment restrictiveness (0–100)* ..... 75.0 ..... 17			9.04 Fixed telephone lines/100 pop.* ..... 24.9 ..... 50		
			9.05 Broadband Internet subscribers/100 pop.* ..... 10.5 ..... 54		
<b>2nd pillar: Environmental sustainability ..... 3.9 ..... 123</b>			9.06 Mobile telephone subscriptions/100 pop.* ..... 134.9 ..... 25		
2.01 Stringency of environmental regulation ..... 3.3 ..... 102			9.07 Mobile broadband subscriptions/100 pop.* ..... 11.7 ..... 72		
2.02 Enforcement of environmental regulation ..... 2.6 ..... 129					
2.03 Sustainability of T&T industry development ..... 4.0 ..... 91			<b>10th pillar: Price competitiveness in T&amp;T ind. .... 4.2 ..... 101</b>		
2.04 Carbon dioxide emission, million tons/capita* ..... 4.8 ..... 79			10.01 Ticket taxes and airport charges (0–100)* ..... 64.4 ..... 111		
2.05 Particulate matter concentration, µg/m <sup>3</sup> * ..... 60.0 ..... 111			10.02 Purchasing power parity* ..... 0.6 ..... 65		
2.06 Threatened species, %* ..... 7.7 ..... 105			10.04 Fuel price, US\$ cents/liter* ..... 105.0 ..... 66		
2.07 Environm. treaty ratification (0–25)* ..... 19 ..... 71			10.03 Extent and effect of taxation ..... 2.3 ..... 132		
			10.05 Hotel price index, US\$* ..... 137.9 ..... 70		
<b>3rd pillar: Safety and security ..... 4.5 ..... 81</b>					
3.01 Business costs of crime and violence ..... 3.8 ..... 111			<b>11th pillar: Human resources ..... 5.0 ..... 57</b>		
3.02 Reliability of police services ..... 2.9 ..... 127			<i>Education and training</i> ..... 4.9 ..... 56		
3.03 Road traffic accidents/100,000 pop.* ..... 13.7 ..... 52			11.01 Primary education enrollment, net %* ..... 99.1 ..... 16		
3.04 Business costs of terrorism ..... 6.0 ..... 42			11.02 Secondary education enrollment, gross %* ..... 88.5 ..... 72		
			11.03 Quality of the educational system ..... 3.4 ..... 88		
<b>4th pillar: Health and hygiene ..... 5.8 ..... 44</b>			11.04 Local availability specialized research & training... 4.3 ..... 60		
4.01 Physician density/1,000 pop.* ..... 3.2 ..... 27			11.05 Extent of staff training ..... 3.8 ..... 77		
4.02 Access to improved sanitation, % pop.* ..... 90.0 ..... 67			<i>Availability of qualified labor</i> ..... 5.0 ..... 75		
4.03 Access to improved drinking water, % pop.* ..... 96.0 ..... 63			11.06 Hiring and firing practices ..... 2.7 ..... 135		
4.04 Hospital beds/10,000 pop.* ..... 45.0 ..... 39			11.07 Ease of hiring foreign labor ..... 4.6 ..... 35		
			11.08 HIV prevalence, % adult pop.* ..... 0.5 ..... 85		
<b>5th pillar: Prioritization of Travel &amp; Tourism ..... 4.2 ..... 81</b>			11.09 Business impact of HIV/AIDS ..... 5.5 ..... 54		
5.01 Government prioritization of the T&T industry ..... 5.1 ..... 78			11.10 Life expectancy, years* ..... 75.8 ..... 46		
5.02 T&T gov't expenditure, % gov't budget* ..... 2.5 ..... 96					
5.03 Effectiveness of marketing to attract tourists ..... 4.3 ..... 77			<b>12th pillar: Affinity for Travel &amp; Tourism ..... 4.3 ..... 107</b>		
5.04 Comprehensiveness of T&T data (0–120)* ..... 80.0 ..... 28			12.01 Tourism openness, % of GDP* ..... 2.5 ..... 108		
5.05 Timeliness of T&T data (0–18)* ..... 13.5 ..... 71			12.02 Attitude of population toward foreign visitors ..... 5.8 ..... 113		
			12.03 Extension of business trips recommended ..... 6.1 ..... 17		
<b>6th pillar: Air transport infrastructure ..... 3.1 ..... 66</b>			12.04 Degree of customer orientation ..... 3.6 ..... 132		
6.01 Quality of air transport infrastructure ..... 3.5 ..... 113					
6.02 Airline seat kms/week, dom., millions* ..... 201.9 ..... 23			<b>13th pillar: Natural resources ..... 5.0 ..... 20</b>		
6.03 Airline seat kms/week, int'l, millions* ..... 553.4 ..... 34			13.01 No. of World Heritage natural sites* ..... 4 ..... 10		
6.04 Departures/1,000 pop.* ..... 2.5 ..... 79			13.02 Quality of the natural environment ..... 3.9 ..... 95		
6.05 Airport density/million pop.* ..... 1.3 ..... 36			13.03 Total known species* ..... 1,528 ..... 13		
6.06 No. of operating airlines* ..... 40.0 ..... 43			13.04 Terrestrial biome protection (0–17%)* ..... 5.0 ..... 107		
6.07 International air transport network ..... 4.2 ..... 96			13.05 Marine protected areas, %* ..... 0.1 ..... 79		
<b>7th pillar: Ground transport infrastructure ..... 2.8 ..... 120</b>			<b>14th pillar: Cultural resources ..... 3.3 ..... 44</b>		
7.01 Quality of roads ..... 3.0 ..... 104			14.01 No. of World Heritage cultural sites* ..... 5 ..... 52		
7.02 Quality of railroad infrastructure ..... 1.7 ..... 101			14.02 Sports stadiums, seats/million pop.* ..... 43,478.1 ..... 61		
7.03 Quality of port infrastructure ..... 3.6 ..... 100			14.03 No. of int'l fairs and exhibitions* ..... 183.7 ..... 19		
7.04 Quality of ground transport network ..... 4.2 ..... 90			14.04 Creative industries exports, % of world total* ..... 0.1 ..... 59		
7.05 Road density/million pop.* ..... 8.0 ..... 120					

# Armenia

## Key indicators

Population (millions), 2011 .....	3.2
Surface area (1,000 square kilometers), 2011 .....	29.7
Gross domestic product (current US\$ billions), 2011 .....	10.3
Gross domestic product (current PPP, \$) per capita, 2011 .....	5,391.8
Real GDP growth (percent), 2011 .....	4.6
Environmental Performance Index 2012, rank (out of 132 economies), 2011 .....	93

## Travel & Tourism indicators

### T&T industry, 2012 estimates

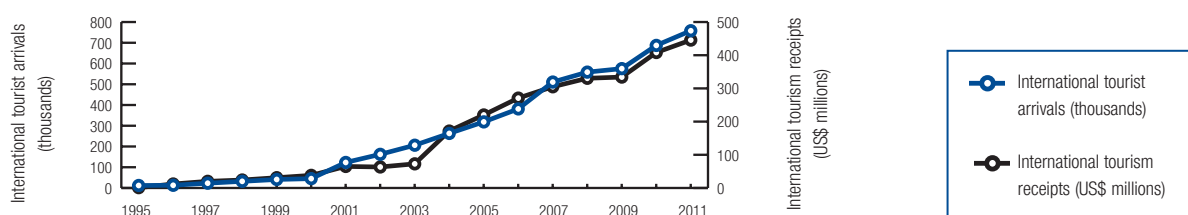
	Absolute value	Percent of total	T&T industry GDP growth forecast (2013–2022)
T&T industry GDP (US\$ millions) .....	214.5	2.0	0.9
T&T industry employment (1,000 jobs) .....	18.9	1.7	-3.7

### T&T economy, 2012 estimates

T&T economy GDP (US\$ millions) .....	838	7.6	1.5
T&T economy employment (1,000 jobs) .....	75	6.8	-3.2

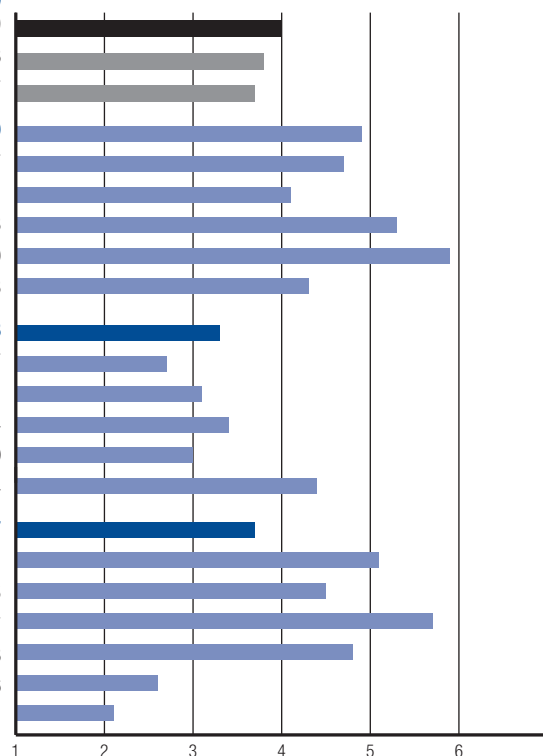
International tourist arrivals (thousands), 2011 ..... 757.9

International tourism receipts (US\$, millions), 2011 ..... 445.6



## The Travel & Tourism Competitiveness Index

	Rank (out of 140)	Score (1–7)
<b>2013 Travel &amp; Tourism Competitiveness Index .....</b>	<b>79</b>	<b>4.0</b>
2011 Travel & Tourism Competitiveness Index .....	90	3.8
2009 Travel & Tourism Competitiveness Index .....	91	3.7
<b>T&amp;T regulatory framework .....</b>	<b>51</b>	<b>4.9</b>
Policy rules and regulations .....	46	4.7
Environmental sustainability .....	114	4.1
Safety and security .....	37	5.3
Health and hygiene .....	39	5.9
Prioritization of Travel & Tourism .....	73	4.3
<b>Business environment and infrastructure .....</b>	<b>88</b>	<b>3.3</b>
Air transport infrastructure .....	85	2.7
Ground transport infrastructure .....	94	3.1
Tourism infrastructure .....	80	3.4
ICT infrastructure .....	73	3.0
Price competitiveness in the T&T industry .....	80	4.4
<b>T&amp;T human, cultural, and natural resources .....</b>	<b>94</b>	<b>3.7</b>
Human resources .....	44	5.1
Education and training .....	84	4.5
Availability of qualified labor .....	8	5.7
Affinity for Travel & Tourism .....	47	4.8
Natural resources .....	124	2.6
Cultural resources .....	81	2.1



**Note:** For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" on page 83.

# Armenia

## The Travel & Tourism Competitiveness Index in detail

INDICATOR	SCORE	RANK
<b>1st pillar: Policy rules and regulations</b> .....	<b>4.7</b> .....	<b>46</b>
1.01 Prevalence of foreign ownership .....	4.3.....	95
1.02 Property rights .....	4.3.....	62
1.03 Business impact of rules on FDI .....	4.5.....	84
1.04 Visa requirements, no. of countries* .....	96.4.....	<b>35</b>
1.05 Openness bilateral ASAs (0–38)* .....	7.5.....	109
1.06 Transparency of government policymaking .....	5.2.....	<b>16</b>
1.07 No. of days to start a business* .....	8.....	<b>33</b>
1.08 Cost to start a business, % GNI/capita* .....	2.5.....	<b>38</b>
1.09 GATS commitment restrictiveness (0–100)* .....	52.9.....	75

<b>2nd pillar: Environmental sustainability</b> .....	<b>4.1</b> .....	<b>114</b>
2.01 Stringency of environmental regulation.....	3.3.....	100
2.02 Enforcement of environmental regulation .....	2.8.....	120
2.03 Sustainability of T&T industry development.....	3.8.....	103
2.04 Carbon dioxide emission, million tons/capita* .....	1.8.....	53
2.05 Particulate matter concentration, µg/m <sup>3</sup> * .....	60.6.....	114
2.06 Threatened species, %* .....	5.6.....	80
2.07 Environm. treaty ratification (0–25)* .....	17.....	96

<b>3rd pillar: Safety and security</b> .....	<b>5.3</b> .....	<b>37</b>
3.01 Business costs of crime and violence .....	5.9.....	<b>13</b>
3.02 Reliability of police services.....	3.8.....	91
3.03 Road traffic accidents/100,000 pop.* .....	13.9.....	55
3.04 Business costs of terrorism .....	6.5.....	<b>8</b>

<b>4th pillar: Health and hygiene</b> .....	<b>5.9</b> .....	<b>39</b>
4.01 Physician density/1,000 pop.* .....	3.8.....	<b>12</b>
4.02 Access to improved sanitation, % pop.* .....	90.0.....	67
4.03 Access to improved drinking water, % pop.* .....	98.0.....	52
4.04 Hospital beds/10,000 pop.* .....	37.0.....	<b>47</b>

<b>5th pillar: Prioritization of Travel &amp; Tourism</b> .....	<b>4.3</b> .....	<b>73</b>
5.01 Government prioritization of the T&T industry .....	5.0.....	83
5.02 T&T gov't expenditure, % gov't budget* .....	3.7.....	60
5.03 Effectiveness of marketing to attract tourists .....	3.8.....	106
5.04 Comprehensiveness of T&T data (0–120)* .....	68.0.....	59
5.05 Timeliness of T&T data (0–18)* .....	16.5.....	<b>17</b>

<b>6th pillar: Air transport infrastructure</b> .....	<b>2.7</b> .....	<b>85</b>
6.01 Quality of air transport infrastructure .....	4.7.....	69
6.02 Airline seat kms/week, dom., millions* .....	0.0.....	105
6.03 Airline seat kms/week, int'l, millions* .....	47.5.....	94
6.04 Departures/1,000 pop.* .....	3.0.....	74
6.05 Airport density/million pop.* .....	0.6.....	71
6.06 No. of operating airlines* .....	27.5.....	65
6.07 International air transport network .....	4.3.....	92

<b>7th pillar: Ground transport infrastructure</b> .....	<b>3.1</b> .....	<b>94</b>
7.01 Quality of roads .....	3.7.....	79
7.02 Quality of railroad infrastructure .....	2.6.....	62
7.03 Quality of port infrastructure.....	3.0.....	125
7.04 Quality of ground transport network .....	4.4.....	76
7.05 Road density/million pop.* .....	26.0.....	78

<b>8th pillar: Tourism infrastructure</b> .....	<b>3.4</b> .....	<b>80</b>
8.01 Hotel rooms/100 pop.* .....	0.1.....	111
8.02 Presence of major car rental co. (1–7)* .....	5.....	66
8.03 ATMs accepting Visa cards/million pop.* .....	305.1.....	66

<b>9th pillar: ICT infrastructure</b> .....	<b>3.0</b> .....	<b>73</b>
9.01 ICT use for B-to-B transactions .....	5.2.....	54
9.02 ICT use for B-to-C transactions .....	4.4.....	82
9.03 Individuals using the Internet, %* .....	32.0.....	83
9.04 Fixed telephone lines/100 pop.* .....	18.6.....	69
9.05 Broadband Internet subscribers/100 pop.* .....	5.0.....	76
9.06 Mobile telephone subscriptions/100 pop.* .....	103.6.....	76
9.07 Mobile broadband subscriptions/100 pop.* .....	25.9.....	<b>45</b>

<b>10th pillar: Price competitiveness in T&amp;T ind.</b> .....	<b>4.4</b> .....	<b>80</b>
10.01 Ticket taxes and airport charges (0–100)* .....	52.2.....	128
10.02 Purchasing power parity* .....	0.6.....	<b>47</b>
10.04 Fuel price, US\$ cents/liter* .....	99.0.....	57
10.03 Extent and effect of taxation .....	3.8.....	<b>43</b>
10.05 Hotel price index, US\$* .....	142.6.....	75

<b>11th pillar: Human resources</b> .....	<b>5.1</b> .....	<b>44</b>
<i>Education and training</i> .....	4.5.....	84
11.01 Primary education enrollment, net %* .....	87.1.....	108
11.02 Secondary education enrollment, gross %* .....	92.0.....	56
11.03 Quality of the educational system .....	3.5.....	78
11.04 Local availability specialized research & training... ..	3.5.....	105
11.05 Extent of staff training .....	3.6.....	96
<i>Availability of qualified labor</i> .....	5.7.....	<b>8</b>
11.06 Hiring and firing practices .....	5.0.....	<b>10</b>
11.07 Ease of hiring foreign labor .....	5.5.....	<b>2</b>
11.08 HIV prevalence, % adult pop.* .....	0.1.....	<b>12</b>
11.09 Business impact of HIV/AIDS.....	5.7.....	<b>46</b>
11.10 Life expectancy, years* .....	73.9.....	66

<b>12th pillar: Affinity for Travel &amp; Tourism</b> .....	<b>4.8</b> .....	<b>47</b>
12.01 Tourism openness, % of GDP* .....	9.0.....	<b>26</b>
12.02 Attitude of population toward foreign visitors .....	6.0.....	95
12.03 Extension of business trips recommended .....	5.5.....	59
12.04 Degree of customer orientation.....	4.4.....	97

<b>13th pillar: Natural resources</b> .....	<b>2.6</b> .....	<b>124</b>
13.01 No. of World Heritage natural sites* .....	0.....	79
13.02 Quality of the natural environment.....	3.5.....	118
13.03 Total known species* .....	395.....	101
13.04 Terrestrial biome protection (0–17%)* .....	8.0.....	88
13.05 Marine protected areas, %* .....	n/a.....	n/a

<b>14th pillar: Cultural resources</b> .....	<b>2.1</b> .....	<b>81</b>
14.01 No. of World Heritage cultural sites* .....	5.....	52
14.02 Sports stadiums, seats/million pop.* .....	38,728.7.....	66
14.03 No. of int'l fairs and exhibitions* .....	4.7.....	96
14.04 Creative industries exports, % of world total* .....	0.0.....	97

# Australia

## Key indicators

Population (millions), 2011 .....	23.5
Surface area (1,000 square kilometers), 2011 .....	7,741.2
Gross domestic product (current US\$ billions), 2011 .....	1,486.9
Gross domestic product (current PPP, \$) per capita, 2011 .....	40,847.1
Real GDP growth (percent), 2011 .....	2.1
Environmental Performance Index 2012, rank (out of 132 economies), 2011 .....	48

## Travel & Tourism indicators

### T&T industry, 2012 estimates

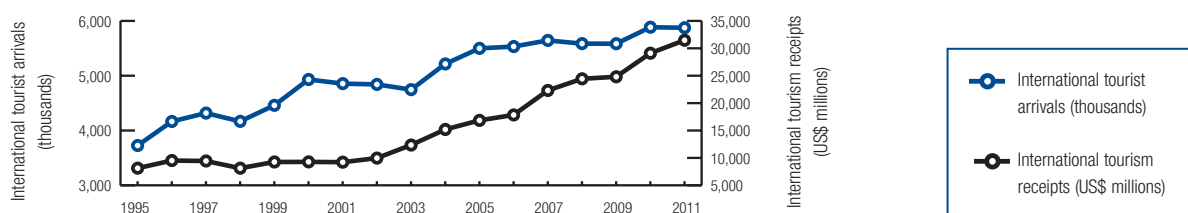
	Absolute value	Percent of total	T&T industry GDP growth forecast (2013–2022)
T&T industry GDP (US\$ millions).....	36,071.2	2.4	2.7
T&T industry employment (1,000 jobs) .....	450.8	3.9	0.6

### T&T economy, 2012 estimates

T&T economy GDP (US\$ millions) .....	147,385	9.6	2.6
T&T economy employment (1,000 jobs) .....	1,316	11.5	0.9

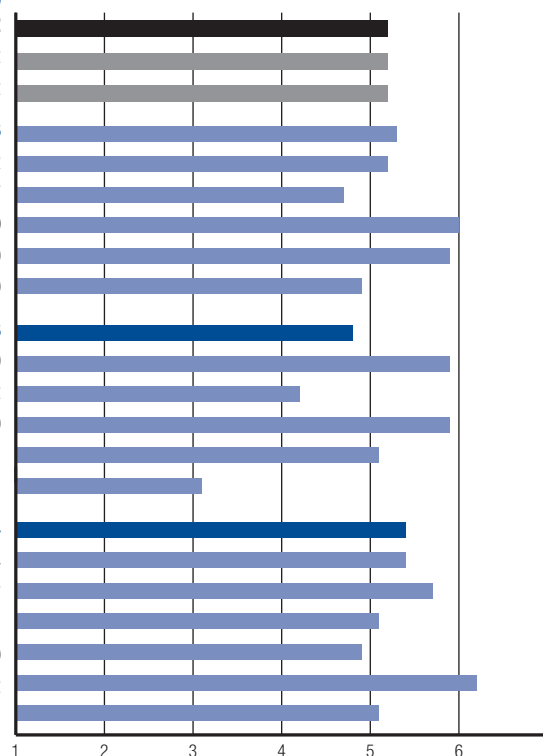
International tourist arrivals (thousands), 2011 .....5,875.3

International tourism receipts (US\$, millions), 2011 .....31,473.1



## The Travel & Tourism Competitiveness Index

	Rank (out of 140)	Score (1–7)
<b>2013 Travel &amp; Tourism Competitiveness Index.....</b>	<b>11</b>	<b>5.2</b>
2011 Travel & Tourism Competitiveness Index.....	13	5.2
2009 Travel & Tourism Competitiveness Index.....	9	5.2
<b>T&amp;T regulatory framework .....</b>	<b>23</b>	<b>5.3</b>
Policy rules and regulations .....	14	5.2
Environmental sustainability .....	56	4.7
Safety and security.....	13	6.0
Health and hygiene.....	40	5.9
Prioritization of Travel & Tourism .....	39	4.9
<b>Business environment and infrastructure .....</b>	<b>25</b>	<b>4.8</b>
Air transport infrastructure .....	4	5.9
Ground transport infrastructure.....	49	4.2
Tourism infrastructure .....	20	5.9
ICT infrastructure .....	18	5.1
Price competitiveness in the T&T industry .....	137	3.1
<b>T&amp;T human, cultural, and natural resources.....</b>	<b>4</b>	<b>5.4</b>
Human resources .....	22	5.4
Education and training.....	17	5.7
Availability of qualified labor.....	62	5.1
Affinity for Travel & Tourism .....	38	4.9
Natural resources .....	2	6.2
Cultural resources.....	20	5.1



**Note:** For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" on page 83.

# Australia

## The Travel & Tourism Competitiveness Index in detail

INDICATOR	SCORE	RANK
<b>1st pillar: Policy rules and regulations</b> ..... 5.2..... 14		
1.01 Prevalence of foreign ownership ..... 5.8..... 8		
1.02 Property rights ..... 5.5..... 25		
1.03 Business impact of rules on FDI ..... 5.0..... 42		
1.04 Visa requirements, no. of countries* ..... 28.5..... 115		
1.05 Openness bilateral ASAs (0–38)* ..... 26.9..... 5		
1.06 Transparency of government policymaking ..... 4.9..... 29		
1.07 No. of days to start a business* ..... 2..... 2		
1.08 Cost to start a business, % GNI/capita* ..... 0.7..... 10		
1.09 GATS commitment restrictiveness (0–100)* ..... 52.4..... 78		

<b>2nd pillar: Environmental sustainability</b> ..... 4.7..... 56		
2.01 Stringency of environmental regulation ..... 5.8..... 14		
2.02 Enforcement of environmental regulation ..... 5.7..... 14		
2.03 Sustainability of T&T industry development ..... 4.9..... 36		
2.04 Carbon dioxide emission, million tons/capita* ..... 18.6..... 132		
2.05 Particulate matter concentration, µg/m <sup>3</sup> * ..... 13.9..... 12		
2.06 Threatened species, %* ..... 12.1..... 123		
2.07 Environm. treaty ratification (0–25)* ..... 23..... 13		

<b>3rd pillar: Safety and security</b> ..... 6.0..... 13		
3.01 Business costs of crime and violence ..... 5.7..... 25		
3.02 Reliability of police services ..... 6.1..... 12		
3.03 Road traffic accidents/100,000 pop.* ..... 7.8..... 16		
3.04 Business costs of terrorism ..... 6.0..... 47		

<b>4th pillar: Health and hygiene</b> ..... 5.9..... 40		
4.01 Physician density/1,000 pop.* ..... 3.0..... 32		
4.02 Access to improved sanitation, % pop.* ..... 100.0..... 1		
4.03 Access to improved drinking water, % pop.* ..... 100.0..... 1		
4.04 Hospital beds/10,000 pop.* ..... 38.0..... 45		

<b>5th pillar: Prioritization of Travel &amp; Tourism</b> ..... 4.9..... 39		
5.01 Government prioritization of the T&T industry ..... 5.9..... 35		
5.02 T&T gov't expenditure, % gov't budget* ..... 3.8..... 59		
5.03 Effectiveness of marketing to attract tourists ..... 5.2..... 32		
5.04 Comprehensiveness of T&T data (0–120)* ..... 60.0..... 82		
5.05 Timeliness of T&T data (0–18)* ..... 16.5..... 17		

<b>6th pillar: Air transport infrastructure</b> ..... 5.9..... 4		
6.01 Quality of air transport infrastructure ..... 5.8..... 29		
6.02 Airline seat kms/week, dom., millions* ..... 1,569.1 ..... 6		
6.03 Airline seat kms/week, int'l, millions* ..... 2,312.0 ..... 9		
6.04 Departures/1,000 pop.* ..... 18.8..... 24		
6.05 Airport density/million pop.* ..... 6.8..... 6		
6.06 No. of operating airlines* ..... 60.5..... 24		
6.07 International air transport network ..... 5.9..... 24		

<b>7th pillar: Ground transport infrastructure</b> ..... 4.2..... 49		
7.01 Quality of roads ..... 5.1..... 36		
7.02 Quality of railroad infrastructure ..... 4.3..... 28		
7.03 Quality of port infrastructure ..... 5.1..... 38		
7.04 Quality of ground transport network ..... 5.1..... 31		
7.05 Road density/million pop.* ..... 11.0..... 110		

<b>8th pillar: Tourism infrastructure</b> ..... 5.9..... 20		
8.01 Hotel rooms/100 pop.* ..... 1.0..... 32		
8.02 Presence of major car rental co. (1–7)* ..... 6..... 32		
8.03 ATMs accepting Visa cards/million pop.* ..... 717.6..... 15		

<b>9th pillar: ICT infrastructure</b> ..... 5.1..... 18		
9.01 ICT use for B-to-B transactions ..... 5.6..... 31		
9.02 ICT use for B-to-C transactions ..... 5.8..... 9		
9.03 Individuals using the Internet, %* ..... 79.0..... 18		
9.04 Fixed telephone lines/100 pop.* ..... 46.8..... 16		
9.05 Broadband Internet subscribers/100 pop.* ..... 24.3..... 25		
9.06 Mobile telephone subscriptions/100 pop.* ..... 108.3..... 65		
9.07 Mobile broadband subscriptions/100 pop.* ..... 73.0..... 10		

<b>10th pillar: Price competitiveness in T&amp;T ind.</b> ..... 3.1..... 137		
10.01 Ticket taxes and airport charges (0–100)* ..... 45.2..... 130		
10.02 Purchasing power parity* ..... 1.5..... 137		
10.04 Fuel price, US\$ cents/liter* ..... 123.0..... 83		
10.03 Extent and effect of taxation ..... 3.2..... 99		
10.05 Hotel price index, US\$* ..... 174.5..... 93		

<b>11th pillar: Human resources</b> ..... 5.4..... 22		
<i>Education and training</i> ..... 5.7..... 17		
11.01 Primary education enrollment, net %* ..... 97.1..... 38		
11.02 Secondary education enrollment, gross %* ..... 131.3..... 1		
11.03 Quality of the educational system ..... 5.0..... 15		
11.04 Local availability specialized research & training ..... 5.3..... 18		
11.05 Extent of staff training ..... 4.6..... 28		
<i>Availability of qualified labor</i> ..... 5.1..... 62		
11.06 Hiring and firing practices ..... 3.2..... 116		
11.07 Ease of hiring foreign labor ..... 3.3..... 124		
11.08 HIV prevalence, % adult pop.* ..... 0.1..... 12		
11.09 Business impact of HIV/AIDS ..... 5.9..... 35		
11.10 Life expectancy, years* ..... 81.7..... 5		

<b>12th pillar: Affinity for Travel &amp; Tourism</b> ..... 4.9..... 38		
12.01 Tourism openness, % of GDP* ..... 3.9..... 80		
12.02 Attitude of population toward foreign visitors ..... 6.5..... 27		
12.03 Extension of business trips recommended ..... 5.8..... 33		
12.04 Degree of customer orientation ..... 5.3..... 25		

<b>13th pillar: Natural resources</b> ..... 6.2..... 2		
13.01 No. of World Heritage natural sites* ..... 16..... 1		
13.02 Quality of the natural environment ..... 6.1..... 10		
13.03 Total known species* ..... 1,266..... 20		
13.04 Terrestrial biome protection (0–17%)* ..... 10.4..... 73		
13.05 Marine protected areas, %* ..... 10.1..... 8		

<b>14th pillar: Cultural resources</b> ..... 5.1..... 20		
14.01 No. of World Heritage cultural sites* ..... 7..... 39		
14.02 Sports stadiums, seats/million pop.* ..... 138,856.9 ..... 10		
14.03 No. of int'l fairs and exhibitions* ..... 219.7 ..... 14		
14.04 Creative industries exports, % of world total* ..... 0.3..... 37		



# Austria

## Key indicators

Population (millions), 2011 .....	8.8
Surface area (1,000 square kilometers), 2011 .....	83.9
Gross domestic product (current US\$ billions), 2011 .....	418.4
Gross domestic product (current PPP, \$) per capita, 2011 .....	41,556.1
Real GDP growth (percent), 2011 .....	2.7
Environmental Performance Index 2012, rank (out of 132 economies), 2011 .....	7

## Travel & Tourism indicators

### T&T industry, 2012 estimates

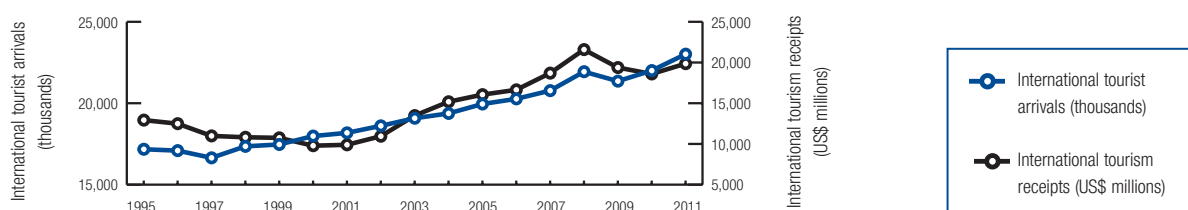
	Absolute value	Percent of total	T&T industry GDP growth forecast (2013–2022)
T&T industry GDP (US\$ millions) .....	20,350.5	4.8	3.0
T&T industry employment (1,000 jobs) .....	216.0	5.2	1.8

### T&T economy, 2012 estimates

T&T economy GDP (US\$ millions) .....	57,977	13.7	2.5
T&T economy employment (1,000 jobs) .....	602	14.6	1.1

International tourist arrivals (thousands), 2011 ..... 23,012.0

International tourism receipts (US\$, millions), 2011 ..... 19,859.7



## The Travel & Tourism Competitiveness Index

	Rank (out of 140)	Score (1–7)
2013 Travel & Tourism Competitiveness Index .....	3	5.4
2011 Travel & Tourism Competitiveness Index .....	4	5.4
2009 Travel & Tourism Competitiveness Index .....	2	5.5

### T&T regulatory framework ..... 2 ..... 5.8

Policy rules and regulations .....	37	4.9
Environmental sustainability .....	6	5.6
Safety and security .....	7	6.1
Health and hygiene .....	1	7.0
Prioritization of Travel & Tourism .....	22	5.4

### Business environment and infrastructure ..... 11 ..... 5.1

Air transport infrastructure .....	30	4.4
Ground transport infrastructure .....	15	5.6
Tourism infrastructure .....	1	7.0
ICT infrastructure .....	20	5.0
Price competitiveness in the T&T industry .....	131	3.5

### T&T human, cultural, and natural resources ..... 9 ..... 5.2

Human resources .....	17	5.6
Education and training .....	9	5.9
Availability of qualified labor .....	45	5.2
Affinity for Travel & Tourism .....	12	5.5
Natural resources .....	49	4.0
Cultural resources .....	12	5.9



**Note:** For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" on page 83.

## Austria

## The Travel &amp; Tourism Competitiveness Index in detail

INDICATOR	SCORE	RANK	INDICATOR	SCORE	RANK
<b>1st pillar: Policy rules and regulations ..... 4.9 ..... 37</b>			<b>8th pillar: Tourism infrastructure ..... 7.0 ..... 1</b>		
1.01 Prevalence of foreign ownership ..... 5.1 ..... 46			8.01 Hotel rooms/100 pop.* ..... 3.5 ..... 4		
1.02 Property rights ..... 5.8 ..... 13			8.02 Presence of major car rental co. (1–7)* ..... 7 ..... 1		
1.03 Business impact of rules on FDI ..... 4.8 ..... 54			8.03 ATMs accepting Visa cards/million pop.* ..... 918.6 ..... 10		
1.04 Visa requirements, no. of countries* ..... 71.0 ..... 58					
1.05 Openness bilateral ASAs (0–38)* ..... 9.4 ..... 88			<b>9th pillar: ICT infrastructure ..... 5.0 ..... 20</b>		
1.06 Transparency of government policymaking ..... 5.1 ..... 20			9.01 ICT use for B-to-B transactions ..... 6.2 ..... 3		
1.07 No. of days to start a business* ..... 25 ..... 96			9.02 ICT use for B-to-C transactions ..... 5.6 ..... 16		
1.08 Cost to start a business, % GNI/capita* ..... 4.9 ..... 51			9.03 Individuals using the Internet, %* ..... 79.8 ..... 15		
1.09 GATS commitment restrictiveness (0–100)* ..... 64.7 ..... 52			9.04 Fixed telephone lines/100 pop.* ..... 40.3 ..... 27		
			9.05 Broadband Internet subscribers/100 pop.* ..... 25.4 ..... 21		
<b>2nd pillar: Environmental sustainability ..... 5.6 ..... 6</b>			9.06 Mobile telephone subscriptions/100 pop.* ..... 154.8 ..... 12		
2.01 Stringency of environmental regulation ..... 6.3 ..... 4			9.07 Mobile broadband subscriptions/100 pop.* ..... 42.6 ..... 23		
2.02 Enforcement of environmental regulation ..... 5.9 ..... 7					
2.03 Sustainability of T&T industry development ..... 5.5 ..... 10			<b>10th pillar: Price competitiveness in T&amp;T ind. .... 3.5 ..... 131</b>		
2.04 Carbon dioxide emission, million tons/capita* ..... 8.1 ..... 107			10.01 Ticket taxes and airport charges (0–100)* ..... 53.7 ..... 126		
2.05 Particulate matter concentration, µg/m <sup>3</sup> * ..... 27.1 ..... 57			10.02 Purchasing power parity* ..... 1.2 ..... 126		
2.06 Threatened species, %* ..... 2.9 ..... 29			10.04 Fuel price, US\$ cents/liter* ..... 155.0 ..... 115		
2.07 Environm. treaty ratification (0–25)* ..... 21 ..... 39			10.03 Extent and effect of taxation ..... 3.2 ..... 94		
			10.05 Hotel price index, US\$* ..... 129.5 ..... 60		
<b>3rd pillar: Safety and security ..... 6.1 ..... 7</b>					
3.01 Business costs of crime and violence ..... 5.8 ..... 19			<b>11th pillar: Human resources ..... 5.6 ..... 17</b>		
3.02 Reliability of police services ..... 6.0 ..... 17			<i>Education and training</i> ..... 5.9 ..... 9		
3.03 Road traffic accidents/100,000 pop.* ..... 8.3 ..... 17			11.01 Primary education enrollment, net %* ..... 98.4 ..... 23		
3.04 Business costs of terrorism ..... 6.6 ..... 4			11.02 Secondary education enrollment, gross %* ..... 98.9 ..... 36		
			11.03 Quality of the educational system ..... 4.7 ..... 26		
<b>4th pillar: Health and hygiene ..... 7.0 ..... 1</b>			11.04 Local availability specialized research & training... 6.1 ..... 3		
4.01 Physician density/1,000 pop.* ..... 4.9 ..... 2			11.05 Extent of staff training ..... 5.0 ..... 12		
4.02 Access to improved sanitation, % pop.* ..... 100.0 ..... 1			<i>Availability of qualified labor</i> ..... 5.2 ..... 45		
4.03 Access to improved drinking water, % pop.* ... 100.0 ..... 1			11.06 Hiring and firing practices ..... 3.5 ..... 97		
4.04 Hospital beds/10,000 pop.* ..... 77.0 ..... 6			11.07 Ease of hiring foreign labor ..... 3.8 ..... 96		
			11.08 HIV prevalence, % adult pop.* ..... 0.3 ..... 66		
<b>5th pillar: Prioritization of Travel &amp; Tourism ..... 5.4 ..... 22</b>			11.09 Business impact of HIV/AIDS ..... 6.4 ..... 9		
5.01 Government prioritization of the T&T industry ..... 6.3 ..... 14			11.10 Life expectancy, years* ..... 80.4 ..... 20		
5.02 T&T gov't expenditure, % gov't budget* ..... 4.8 ..... 40					
5.03 Effectiveness of marketing to attract tourists ..... 6.0 ..... 4			<b>12th pillar: Affinity for Travel &amp; Tourism ..... 5.5 ..... 12</b>		
5.04 Comprehensiveness of T&T data (0–120)* ..... 67.0 ..... 66			12.01 Tourism openness, % of GDP* ..... 7.3 ..... 34		
5.05 Timeliness of T&T data (0–18)* ..... 16.5 ..... 17			12.02 Attitude of population toward foreign visitors ..... 6.7 ..... 5		
			12.03 Extension of business trips recommended ..... 6.4 ..... 3		
<b>6th pillar: Air transport infrastructure ..... 4.4 ..... 30</b>			12.04 Degree of customer orientation ..... 5.9 ..... 3		
6.01 Quality of air transport infrastructure ..... 5.8 ..... 31					
6.02 Airline seat kms/week, dom., millions* ..... 7.2 ..... 53			<b>13th pillar: Natural resources ..... 4.0 ..... 49</b>		
6.03 Airline seat kms/week, int'l, millions* ..... 410.9 ..... 37			13.01 No. of World Heritage natural sites* ..... 0 ..... 79		
6.04 Departures/1,000 pop.* ..... 21.9 ..... 18			13.02 Quality of the natural environment ..... 6.7 ..... 1		
6.05 Airport density/million pop.* ..... 0.7 ..... 63			13.03 Total known species* ..... 417 ..... 91		
6.06 No. of operating airlines* ..... 74.0 ..... 17			13.04 Terrestrial biome protection (0–17%)* ..... 14.8 ..... 35		
6.07 International air transport network ..... 5.8 ..... 27			13.05 Marine protected areas, %* ..... n/a ..... n/a		
<b>7th pillar: Ground transport infrastructure ..... 5.6 ..... 15</b>			<b>14th pillar: Cultural resources ..... 5.9 ..... 12</b>		
7.01 Quality of roads ..... 6.3 ..... 7			14.01 No. of World Heritage cultural sites* ..... 9 ..... 29		
7.02 Quality of railroad infrastructure ..... 5.3 ..... 12			14.02 Sports stadiums, seats/million pop.* ..... 71,791.9 ..... 35		
7.03 Quality of port infrastructure ..... 4.9 ..... 44			14.03 No. of int'l fairs and exhibitions* ..... 251.7 ..... 12		
7.04 Quality of ground transport network ..... 5.8 ..... 15			14.04 Creative industries exports, % of world total* ..... 1.3 ..... 19		
7.05 Road density/million pop.* ..... 127.0 ..... 29					

# Azerbaijan

## Key indicators

Population (millions), 2011 .....	9.4
Surface area (1,000 square kilometers), 2011 .....	86.6
Gross domestic product (current US\$ billions), 2011 .....	64.8
Gross domestic product (current PPP, \$) per capita, 2011 .....	10,201.4
Real GDP growth (percent), 2011 .....	0.1
Environmental Performance Index 2012, rank (out of 132 economies), 2011 .....	111

## Travel & Tourism indicators

### T&T industry, 2012 estimates

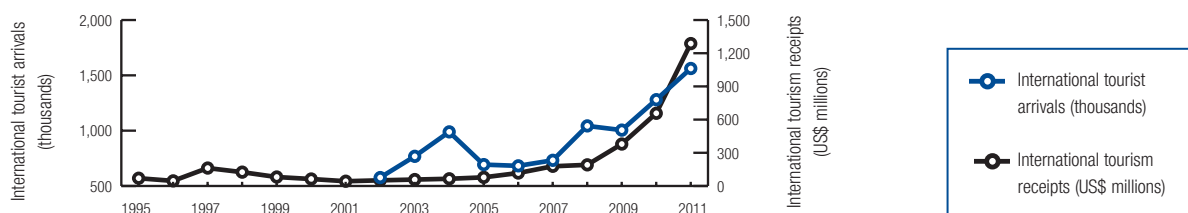
	Absolute value	Percent of total	T&T industry GDP growth forecast (2013–2022)
T&T industry GDP (US\$ millions) .....	1,101.4	1.9	7.5
T&T industry employment (1,000 jobs) .....	73.3	1.7	2.7

### T&T economy, 2012 estimates

T&T economy GDP (US\$ millions) .....	4,116	6.9	7.5
T&T economy employment (1,000 jobs) .....	277	6.3	2.6

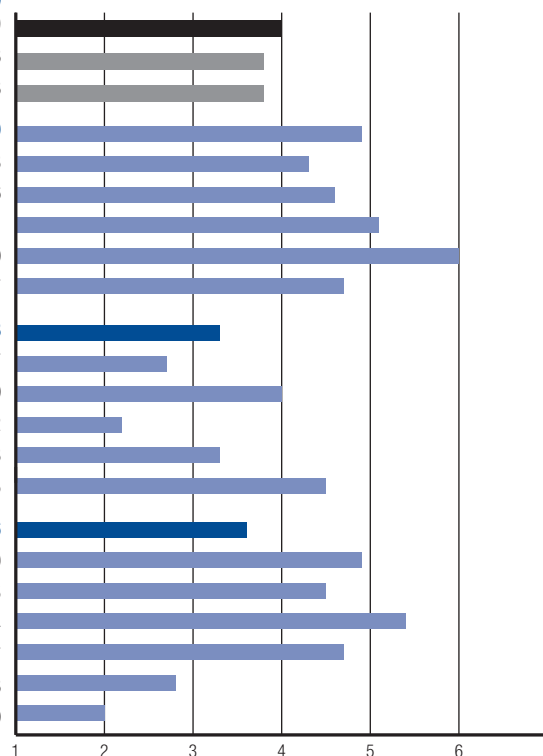
International tourist arrivals (thousands), 2011 ..... 1,561.9

International tourism receipts (US\$, millions), 2011 ..... 1,287.0



## The Travel & Tourism Competitiveness Index

	Rank (out of 140)	Score (1–7)
<b>2013 Travel &amp; Tourism Competitiveness Index .....</b>	<b>78</b>	<b>4.0</b>
2011 Travel & Tourism Competitiveness Index .....	83	3.8
2009 Travel & Tourism Competitiveness Index .....	76	3.8
<b>T&amp;T regulatory framework .....</b>	<b>46</b>	<b>4.9</b>
Policy rules and regulations .....	85	4.3
Environmental sustainability .....	67	4.6
Safety and security .....	52	5.1
Health and hygiene .....	34	6.0
Prioritization of Travel & Tourism .....	48	4.7
<b>Business environment and infrastructure .....</b>	<b>87</b>	<b>3.3</b>
Air transport infrastructure .....	83	2.7
Ground transport infrastructure .....	57	4.0
Tourism infrastructure .....	109	2.2
ICT infrastructure .....	63	3.3
Price competitiveness in the T&T industry .....	77	4.5
<b>T&amp;T human, cultural, and natural resources .....</b>	<b>96</b>	<b>3.6</b>
Human resources .....	59	4.9
Education and training .....	85	4.5
Availability of qualified labor .....	19	5.4
Affinity for Travel & Tourism .....	62	4.7
Natural resources .....	110	2.8
Cultural resources .....	85	2.0



**Note:** For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" on page 83.

# Azerbaijan

## The Travel & Tourism Competitiveness Index in detail

INDICATOR	SCORE	RANK	INDICATOR	SCORE	RANK
<b>1st pillar: Policy rules and regulations ..... 4.3 ..... 85</b>			<b>8th pillar: Tourism infrastructure ..... 2.2 ..... 109</b>		
1.01 Prevalence of foreign ownership ..... 4.3 ..... 96			8.01 Hotel rooms/100 pop.* ..... 0.2 ..... 96		
1.02 Property rights ..... 4.0 ..... 85			8.02 Presence of major car rental co. (1–7)* ..... 1 ..... 123		
1.03 Business impact of rules on FDI ..... 4.4 ..... 86			8.03 ATMs accepting Visa cards/million pop.* ..... 246.2 ..... 75		
1.04 Visa requirements, no. of countries* ..... 9.0 ..... 133					
1.05 Openness bilateral ASAs (0–38)* ..... 10.7 ..... 72			<b>9th pillar: ICT infrastructure ..... 3.3 ..... 63</b>		
1.06 Transparency of government policymaking ..... 4.5 ..... 48			9.01 ICT use for B-to-B transactions ..... 4.8 ..... 78		
1.07 No. of days to start a business* ..... 8 ..... 33			9.02 ICT use for B-to-C transactions ..... 4.4 ..... 77		
1.08 Cost to start a business, % GNI/capita* ..... 2.3 ..... 33			9.03 Individuals using the Internet, %* ..... 50.0 ..... 56		
1.09 GATS commitment restrictiveness (0–100)* ..... n/a ..... n/a			9.04 Fixed telephone lines/100 pop.* ..... 18.1 ..... 71		
			9.05 Broadband Internet subscribers/100 pop.* ..... 10.7 ..... 53		
<b>2nd pillar: Environmental sustainability ..... 4.6 ..... 67</b>			9.06 Mobile telephone subscriptions/100 pop.* ..... 108.7 ..... 62		
2.01 Stringency of environmental regulation ..... 4.0 ..... 63			9.07 Mobile broadband subscriptions/100 pop.* ..... 21.5 ..... 50		
2.02 Enforcement of environmental regulation ..... 3.9 ..... 54					
2.03 Sustainability of T&T industry development ..... 4.9 ..... 41			<b>10th pillar: Price competitiveness in T&amp;T ind. .... 4.5 ..... 77</b>		
2.04 Carbon dioxide emission, million tons/capita* ..... 5.4 ..... 87			10.01 Ticket taxes and airport charges (0–100)* ..... 59.3 ..... 121		
2.05 Particulate matter concentration, µg/m <sup>3</sup> * ..... 28.8 ..... 62			10.02 Purchasing power parity* ..... 0.7 ..... 79		
2.06 Threatened species, %* ..... 4.9 ..... 67			10.04 Fuel price, US\$ cents/liter* ..... 56.0 ..... 17		
2.07 Environm. treaty ratification (0–25)* ..... 15 ..... 123			10.03 Extent and effect of taxation ..... 3.7 ..... 46		
			10.05 Hotel price index, US\$* ..... 179.8 ..... 97		
<b>3rd pillar: Safety and security ..... 5.1 ..... 52</b>					
3.01 Business costs of crime and violence ..... 5.3 ..... 50			<b>11th pillar: Human resources ..... 4.9 ..... 59</b>		
3.02 Reliability of police services ..... 4.0 ..... 79			<i>Education and training</i> ..... 4.5 ..... 85		
3.03 Road traffic accidents/100,000 pop.* ..... 13.0 ..... 46			11.01 Primary education enrollment, net %* ..... 84.4 ..... 116		
3.04 Business costs of terrorism ..... 5.8 ..... 53			11.02 Secondary education enrollment, gross %* ..... 84.6 ..... 81		
			11.03 Quality of the educational system ..... 3.1 ..... 108		
<b>4th pillar: Health and hygiene ..... 6.0 ..... 34</b>			11.04 Local availability specialized research & training ..... 4.4 ..... 49		
4.01 Physician density/1,000 pop.* ..... 3.8 ..... 10			11.05 Extent of staff training ..... 4.1 ..... 56		
4.02 Access to improved sanitation, % pop.* ..... 82.0 ..... 82			<i>Availability of qualified labor</i> ..... 5.4 ..... 19		
4.03 Access to improved drinking water, % pop.* ..... 80.0 ..... 112			11.06 Hiring and firing practices ..... 5.4 ..... 4		
4.04 Hospital beds/10,000 pop.* ..... 75.0 ..... 8			11.07 Ease of hiring foreign labor ..... 4.5 ..... 41		
			11.08 HIV prevalence, % adult pop.* ..... 0.1 ..... 12		
<b>5th pillar: Prioritization of Travel &amp; Tourism ..... 4.7 ..... 48</b>			11.09 Business impact of HIV/AIDS ..... 5.4 ..... 65		
5.01 Government prioritization of the T&T industry ..... 5.8 ..... 41			11.10 Life expectancy, years* ..... 70.5 ..... 92		
5.02 T&T gov't expenditure, % gov't budget* ..... 3.1 ..... 73					
5.03 Effectiveness of marketing to attract tourists ..... 5.0 ..... 44			<b>12th pillar: Affinity for Travel &amp; Tourism ..... 4.7 ..... 62</b>		
5.04 Comprehensiveness of T&T data (0–120)* ..... 84.0 ..... 22			12.01 Tourism openness, % of GDP* ..... 4.6 ..... 71		
5.05 Timeliness of T&T data (0–18)* ..... 13.5 ..... 71			12.02 Attitude of population toward foreign visitors ..... 6.2 ..... 82		
			12.03 Extension of business trips recommended ..... 5.6 ..... 46		
<b>6th pillar: Air transport infrastructure ..... 2.7 ..... 83</b>			12.04 Degree of customer orientation ..... 4.7 ..... 56		
6.01 Quality of air transport infrastructure ..... 5.0 ..... 53					
6.02 Airline seat kms/week, dom., millions* ..... 0.2 ..... 90			<b>13th pillar: Natural resources ..... 2.8 ..... 110</b>		
6.03 Airline seat kms/week, int'l, millions* ..... 72.3 ..... 84			13.01 No. of World Heritage natural sites* ..... 0 ..... 79		
6.04 Departures/1,000 pop.* ..... 1.1 ..... 96			13.02 Quality of the natural environment ..... 4.5 ..... 63		
6.05 Airport density/million pop.* ..... 0.3 ..... 100			13.03 Total known species* ..... 472 ..... 79		
6.06 No. of operating airlines* ..... 26.5 ..... 67			13.04 Terrestrial biome protection (0–17%)* ..... 6.8 ..... 93		
6.07 International air transport network ..... 4.9 ..... 60			13.05 Marine protected areas, %* ..... n/a ..... n/a		
<b>7th pillar: Ground transport infrastructure ..... 4.0 ..... 57</b>			<b>14th pillar: Cultural resources ..... 2.0 ..... 85</b>		
7.01 Quality of roads ..... 4.0 ..... 67			14.01 No. of World Heritage cultural sites* ..... 6 ..... 45		
7.02 Quality of railroad infrastructure ..... 3.9 ..... 35			14.02 Sports stadiums, seats/million pop.* ..... 24,998.7 ..... 84		
7.03 Quality of port infrastructure ..... 4.0 ..... 77			14.03 No. of int'l fairs and exhibitions* ..... 2.7 ..... 119		
7.04 Quality of ground transport network ..... 4.8 ..... 44			14.04 Creative industries exports, % of world total* ..... 0.0 ..... 112		
7.05 Road density/million pop.* ..... 61.0 ..... 49					

# Bahrain

## Key indicators

Population (millions), 2011 .....	1.3
Surface area (1,000 square kilometers), 2011 .....	0.8
Gross domestic product (current US\$ billions), 2011 .....	25.9
Gross domestic product (current PPP, \$) per capita, 2011 .....	27,735.3
Real GDP growth (percent), 2011 .....	2.1
Environmental Performance Index 2012, rank (out of 132 economies), 2011 .....	n/a

## Travel & Tourism indicators

### T&T industry, 2012 estimates

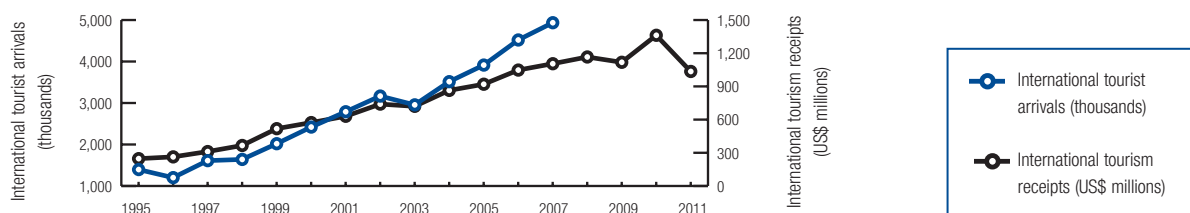
	Absolute value	Percent of total	T&T industry GDP growth forecast (2013–2022)
T&T industry GDP (US\$ millions).....	1,421.6	5.6	3.7
T&T industry employment (1,000 jobs) .....	28.4	5.9	2.3

### T&T economy, 2012 estimates

T&T economy GDP (US\$ millions) .....	3,616	14.3	3.9
T&T economy employment (1,000 jobs) .....	69	14.3	2.4

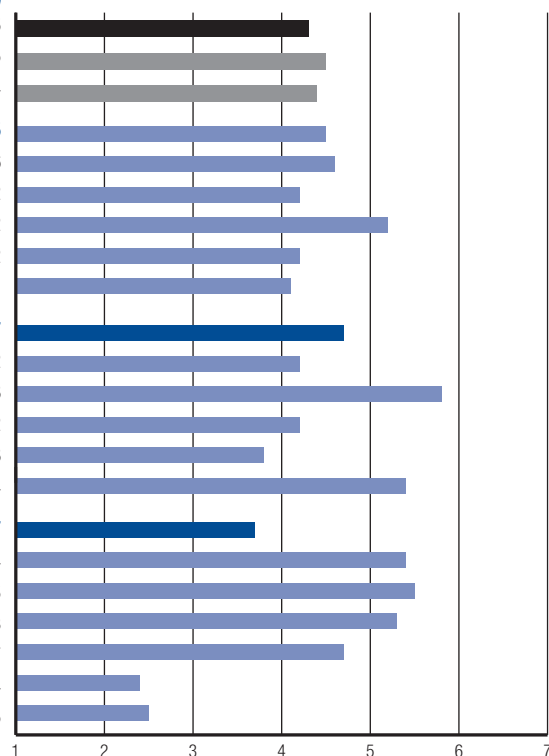
International tourist arrivals (thousands), 2007 .....4,935.0

International tourism receipts (US\$, millions), 2011 .....1,035.0



## The Travel & Tourism Competitiveness Index

	Rank (out of 140)	Score (1–7)
<b>2013 Travel &amp; Tourism Competitiveness Index.....</b>	<b>55</b>	<b>4.3</b>
2011 Travel & Tourism Competitiveness Index.....	40	4.5
2009 Travel & Tourism Competitiveness Index.....	41	4.4
<b>T&amp;T regulatory framework .....</b>	<b>77</b>	<b>4.5</b>
Policy rules and regulations .....	57	4.6
Environmental sustainability .....	103	4.2
Safety and security.....	49	5.2
Health and hygiene.....	89	4.2
Prioritization of Travel & Tourism .....	95	4.1
<b>Business environment and infrastructure .....</b>	<b>32</b>	<b>4.7</b>
Air transport infrastructure .....	38	4.2
Ground transport infrastructure.....	11	5.8
Tourism infrastructure .....	66	4.2
ICT infrastructure .....	47	3.8
Price competitiveness in the T&T industry .....	7	5.4
<b>T&amp;T human, cultural, and natural resources.....</b>	<b>83</b>	<b>3.7</b>
Human resources .....	26	5.4
Education and training.....	24	5.5
Availability of qualified labor.....	33	5.3
Affinity for Travel & Tourism .....	59	4.7
Natural resources .....	129	2.4
Cultural resources.....	67	2.5



**Note:** For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" on page 83.

# Bahrain

## The Travel & Tourism Competitiveness Index in detail

INDICATOR	SCORE	RANK	INDICATOR	SCORE	RANK
<b>1st pillar: Policy rules and regulations</b> ..... 4.6 ..... 57			<b>8th pillar: Tourism infrastructure</b> ..... 4.2 ..... 66		
1.01 Prevalence of foreign ownership ..... 5.7 ..... 13			8.01 Hotel rooms/100 pop.* ..... 0.7 ..... 46		
1.02 Property rights ..... 5.7 ..... 19			8.02 Presence of major car rental co. (1–7)* ..... 6 ..... 32		
1.03 Business impact of rules on FDI ..... 6.0 ..... 3			8.03 ATMs accepting Visa cards/million pop.* ..... 246.3 ..... 74		
1.04 Visa requirements, no. of countries* ..... 23.0 ..... 120					
1.05 Openness bilateral ASAs (0–38)* ..... 10.2 ..... 76			<b>9th pillar: ICT infrastructure</b> ..... 3.8 ..... 47		
1.06 Transparency of government policymaking ..... 5.4 ..... 12			9.01 ICT use for B-to-B transactions ..... 5.6 ..... 29		
1.07 No. of days to start a business* ..... 9 ..... 42			9.02 ICT use for B-to-C transactions ..... 4.0 ..... 97		
1.08 Cost to start a business, % GNI/capita* ..... 0.7 ..... 10			9.03 Individuals using the Internet, %* ..... 77.0 ..... 21		
1.09 GATS commitment restrictiveness (0–100)* ..... 0.0 ..... 117			9.04 Fixed telephone lines/100 pop.* ..... 20.9 ..... 61		
			9.05 Broadband Internet subscribers/100 pop.* ..... 13.8 ..... 43		
<b>2nd pillar: Environmental sustainability</b> ..... 4.2 ..... 103			9.06 Mobile telephone subscriptions/100 pop.* ..... 128.0 ..... 33		
2.01 Stringency of environmental regulation ..... 4.7 ..... 42			9.07 Mobile broadband subscriptions/100 pop.* ..... 9.5 ..... 75		
2.02 Enforcement of environmental regulation ..... 4.5 ..... 36					
2.03 Sustainability of T&T industry development ..... 4.7 ..... 56			<b>10th pillar: Price competitiveness in T&amp;T ind.</b> ..... 5.4 ..... 7		
2.04 Carbon dioxide emission, million tons/capita* ..... 21.4 ..... 133			10.01 Ticket taxes and airport charges (0–100)* ..... 93.0 ..... 10		
2.05 Particulate matter concentration, µg/m <sup>3</sup> * ..... 45.5 ..... 98			10.02 Purchasing power parity* ..... 0.8 ..... 93		
2.06 Threatened species, %* ..... 2.5 ..... 16			10.04 Fuel price, US\$ cents/liter* ..... 13.0 ..... 4		
2.07 Environm. treaty ratification (0–25)* ..... 17 ..... 96			10.03 Extent and effect of taxation ..... 6.3 ..... 1		
			10.05 Hotel price index, US\$* ..... 219.0 ..... 107		
<b>3rd pillar: Safety and security</b> ..... 5.2 ..... 49					
3.01 Business costs of crime and violence ..... 4.9 ..... 65			<b>11th pillar: Human resources</b> ..... 5.4 ..... 26		
3.02 Reliability of police services ..... 5.6 ..... 29			<i>Education and training</i> ..... 5.5 ..... 24		
3.03 Road traffic accidents/100,000 pop.* ..... 12.1 ..... 35			11.01 Primary education enrollment, net %* ..... 97.8 ..... 31		
3.04 Business costs of terrorism ..... 4.9 ..... 106			11.02 Secondary education enrollment, gross %* ..... 103.1 ..... 20		
			11.03 Quality of the educational system ..... 4.4 ..... 35		
<b>4th pillar: Health and hygiene</b> ..... 4.2 ..... 89			11.04 Local availability specialized research & training ..... 4.6 ..... 41		
4.01 Physician density/1,000 pop.* ..... 1.4 ..... 76			11.05 Extent of staff training ..... 4.6 ..... 25		
4.02 Access to improved sanitation, % pop.* ..... 100.0 ..... 1			<i>Availability of qualified labor</i> ..... 5.3 ..... 33		
4.03 Access to improved drinking water, % pop.* ..... n/a ..... n/a			11.06 Hiring and firing practices ..... 4.0 ..... 64		
4.04 Hospital beds/10,000 pop.* ..... 18.0 ..... 87			11.07 Ease of hiring foreign labor ..... 4.4 ..... 48		
			11.08 HIV prevalence, % adult pop.* ..... n/a ..... 1		
<b>5th pillar: Prioritization of Travel &amp; Tourism</b> ..... 4.1 ..... 95			11.09 Business impact of HIV/AIDS ..... 5.8 ..... 36		
5.01 Government prioritization of the T&T industry ..... 6.1 ..... 27			11.10 Life expectancy, years* ..... 75.2 ..... 50		
5.02 T&T gov't expenditure, % gov't budget* ..... 3.9 ..... 53					
5.03 Effectiveness of marketing to attract tourists ..... 4.8 ..... 57			<b>12th pillar: Affinity for Travel &amp; Tourism</b> ..... 4.7 ..... 59		
5.04 Comprehensiveness of T&T data (0–120)* ..... 46.0 ..... 106			12.01 Tourism openness, % of GDP* ..... 6.8 ..... 38		
5.05 Timeliness of T&T data (0–18)* ..... 0.0 ..... 126			12.02 Attitude of population toward foreign visitors ..... 6.6 ..... 20		
			12.03 Extension of business trips recommended ..... 4.5 ..... 123		
<b>6th pillar: Air transport infrastructure</b> ..... 4.2 ..... 38			12.04 Degree of customer orientation ..... 5.0 ..... 40		
6.01 Quality of air transport infrastructure ..... 6.0 ..... 16					
6.02 Airline seat kms/week, dom., millions* ..... 0.0 ..... 105			<b>13th pillar: Natural resources</b> ..... 2.4 ..... 129		
6.03 Airline seat kms/week, int'l, millions* ..... 223.0 ..... 54			13.01 No. of World Heritage natural sites* ..... 0 ..... 79		
6.04 Departures/1,000 pop.* ..... 45.8 ..... 6			13.02 Quality of the natural environment ..... 4.3 ..... 75		
6.05 Airport density/million pop.* ..... 0.8 ..... 59			13.03 Total known species* ..... 244 ..... 134		
6.06 No. of operating airlines* ..... 26.5 ..... 67			13.04 Terrestrial biome protection (0–17%)* ..... 1.3 ..... 130		
6.07 International air transport network ..... 6.1 ..... 13			13.05 Marine protected areas, %* ..... 0.4 ..... 64		
<b>7th pillar: Ground transport infrastructure</b> ..... 5.8 ..... 11			<b>14th pillar: Cultural resources</b> ..... 2.5 ..... 67		
7.01 Quality of roads ..... 5.8 ..... 18			14.01 No. of World Heritage cultural sites* ..... 2 ..... 88		
7.02 Quality of railroad infrastructure ..... n/a ..... n/a			14.02 Sports stadiums, seats/million pop.* ..... 108,482.2 ..... 21		
7.03 Quality of port infrastructure ..... 6.0 ..... 10			14.03 No. of int'l fairs and exhibitions* ..... 5.7 ..... 89		
7.04 Quality of ground transport network ..... 4.5 ..... 62			14.04 Creative industries exports, % of world total* ..... 0.0 ..... 88		
7.05 Road density/million pop.* ..... 575.0 ..... 2					

# Bangladesh

## Key indicators

Population (millions), 2011 .....	151.6
Surface area (1,000 square kilometers), 2011 .....	144.0
Gross domestic product (current US\$ billions), 2011 .....	113.9
Gross domestic product (current PPP, \$) per capita, 2011 .....	1,909.5
Real GDP growth (percent), 2011 .....	6.5
Environmental Performance Index 2012, rank (out of 132 economies), 2011 .....	115

## Travel & Tourism indicators

### T&T industry, 2012 estimates

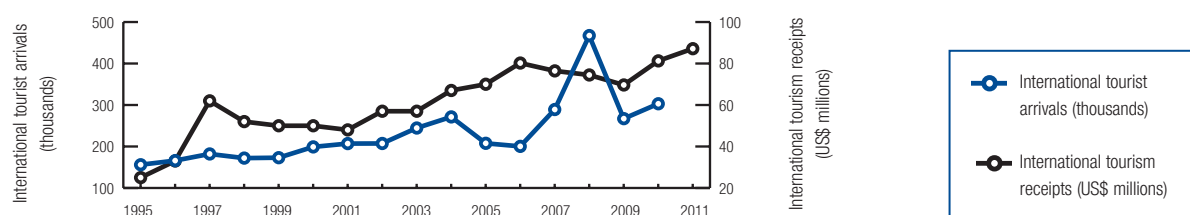
	Absolute value	Percent of total	T&T industry GDP growth forecast (2013–2022)
T&T industry GDP (US\$ millions) .....	2,756.2	2.3	6.1
T&T industry employment (1,000 jobs) .....	1,377.0	1.9	2.9

### T&T economy, 2012 estimates

T&T economy GDP (US\$ millions) .....	5,775	4.7	6.5
T&T economy employment (1,000 jobs) .....	2,992	4.1	3.2

International tourist arrivals (thousands), 2010.....303.0

International tourism receipts (US\$, millions), 2011.....87.1



## The Travel & Tourism Competitiveness Index

	Rank (out of 140)	Score (1–7)
<b>2013 Travel &amp; Tourism Competitiveness Index .....</b>	<b>123</b>	<b>3.2</b>
2011 Travel & Tourism Competitiveness Index .....	129	3.1
2009 Travel & Tourism Competitiveness Index .....	129	3.0

### T&T regulatory framework .....124 .....3.6

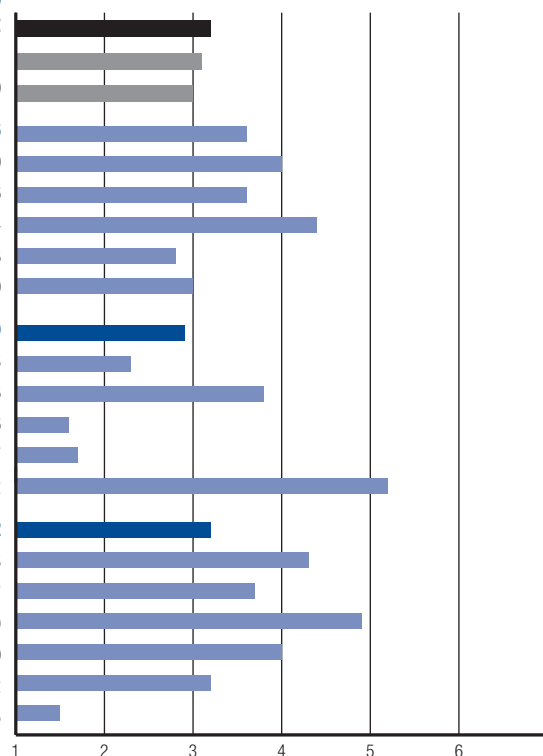
Policy rules and regulations .....	108	4.0
Environmental sustainability .....	133	3.6
Safety and security .....	83	4.4
Health and hygiene .....	114	2.8
Prioritization of Travel & Tourism .....	129	3.0

### Business environment and infrastructure .....109 .....2.9

Air transport infrastructure .....	113	2.3
Ground transport infrastructure .....	65	3.8
Tourism infrastructure .....	127	1.6
ICT infrastructure .....	128	1.7
Price competitiveness in the T&T industry .....	16	5.2

### T&T human, cultural, and natural resources.....124 .....3.2

Human resources .....	108	4.3
Education and training .....	122	3.7
Availability of qualified labor .....	89	4.9
Affinity for Travel & Tourism .....	130	4.0
Natural resources .....	90	3.2
Cultural resources .....	116	1.5



**Note:** For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" on page 83.



# Bangladesh

## The Travel & Tourism Competitiveness Index in detail

INDICATOR	SCORE	RANK	INDICATOR	SCORE	RANK
<b>1st pillar: Policy rules and regulations ..... 4.0 ..... 108</b>			<b>8th pillar: Tourism infrastructure ..... 1.6 ..... 127</b>		
1.01 Prevalence of foreign ownership ..... 4.0 ..... 114			8.01 Hotel rooms/100 pop.* ..... 0.0 ..... 139		
1.02 Property rights ..... 3.6 ..... 101			8.02 Presence of major car rental co. (1–7)* ..... 2 ..... 111		
1.03 Business impact of rules on FDI ..... 5.2 ..... <b>26</b>			8.03 ATMs accepting Visa cards/million pop.* ..... 23.4 ..... 117		
1.04 Visa requirements, no. of countries* ..... 62.0 ..... 97					
1.05 Openness bilateral ASAs (0–38)* ..... 6.2 ..... 123			<b>9th pillar: ICT infrastructure ..... 1.7 ..... 128</b>		
1.06 Transparency of government policymaking ..... 3.9 ..... 98			9.01 ICT use for B-to-B transactions ..... 4.1 ..... 124		
1.07 No. of days to start a business* ..... 19 ..... 80			9.02 ICT use for B-to-C transactions ..... 3.6 ..... 116		
1.08 Cost to start a business, % GNI/capita* ..... 25.1 ..... 105			9.03 Individuals using the Internet, %* ..... 5.0 ..... 124		
1.09 GATS commitment restrictiveness (0–100)* ..... 33.1 ..... 109			9.04 Fixed telephone lines/100 pop.* ..... 0.6 ..... 129		
			9.05 Broadband Internet subscribers/100 pop.* ..... 0.3 ..... 111		
<b>2nd pillar: Environmental sustainability ..... 3.6 ..... 133</b>			9.06 Mobile telephone subscriptions/100 pop.* ..... 56.1 ..... 124		
2.01 Stringency of environmental regulation ..... 3.2 ..... 110			9.07 Mobile broadband subscriptions/100 pop.* ..... 0.0 ..... 127		
2.02 Enforcement of environmental regulation ..... 2.7 ..... 126					
2.03 Sustainability of T&T industry development ..... 3.0 ..... 131			<b>10th pillar: Price competitiveness in T&amp;T ind. .... 5.2 ..... 16</b>		
2.04 Carbon dioxide emission, million tons/capita* ..... 0.3 ..... <b>20</b>			10.01 Ticket taxes and airport charges (0–100)* ..... 68.0 ..... 106		
2.05 Particulate matter concentration, µg/m <sup>3</sup> * ..... 120.9 ..... 136			10.02 Purchasing power parity* ..... 0.4 ..... <b>11</b>		
2.06 Threatened species, %* ..... 8.6 ..... 111			10.04 Fuel price, US\$ cents/liter* ..... 63.0 ..... <b>19</b>		
2.07 Environm. treaty ratification (0–25)* ..... 19 ..... 71			10.03 Extent and effect of taxation ..... 4.0 ..... <b>31</b>		
			10.05 Hotel price index, US\$* ..... 114.1 ..... <b>39</b>		
<b>3rd pillar: Safety and security ..... 4.4 ..... 83</b>					
3.01 Business costs of crime and violence ..... 4.3 ..... 93			<b>11th pillar: Human resources ..... 4.3 ..... 108</b>		
3.02 Reliability of police services ..... 3.0 ..... 122			<i>Education and training</i> ..... 3.7 ..... 122		
3.03 Road traffic accidents/100,000 pop.* ..... 12.6 ..... <b>40</b>			11.01 Primary education enrollment, net %* ..... 92.2 ..... 82		
3.04 Business costs of terrorism ..... 5.1 ..... 99			11.02 Secondary education enrollment, gross %* ..... 51.4 ..... 113		
			11.03 Quality of the educational system ..... 3.2 ..... 96		
<b>4th pillar: Health and hygiene ..... 2.8 ..... 114</b>			11.04 Local availability specialized research & training ..... 2.8 ..... 135		
4.01 Physician density/1,000 pop.* ..... 0.3 ..... 110			11.05 Extent of staff training ..... 3.0 ..... 133		
4.02 Access to improved sanitation, % pop.* ..... 56.0 ..... 103			<i>Availability of qualified labor</i> ..... 4.9 ..... 89		
4.03 Access to improved drinking water, % pop.* ..... 81.0 ..... 111			11.06 Hiring and firing practices ..... 4.7 ..... <b>20</b>		
4.04 Hospital beds/10,000 pop.* ..... 3.0 ..... 137			11.07 Ease of hiring foreign labor ..... 3.3 ..... 126		
			11.08 HIV prevalence, % adult pop.* ..... 0.1 ..... <b>12</b>		
<b>5th pillar: Prioritization of Travel &amp; Tourism ..... 3.0 ..... 129</b>			11.09 Business impact of HIV/AIDS ..... 5.6 ..... <b>50</b>		
5.01 Government prioritization of the T&T industry ..... 4.3 ..... 116			11.10 Life expectancy, years* ..... 68.9 ..... 99		
5.02 T&T gov't expenditure, % gov't budget* ..... 2.1 ..... 103					
5.03 Effectiveness of marketing to attract tourists ..... 3.2 ..... 128			<b>12th pillar: Affinity for Travel &amp; Tourism ..... 4.0 ..... 130</b>		
5.04 Comprehensiveness of T&T data (0–120)* ..... 34.0 ..... 123			12.01 Tourism openness, % of GDP* ..... 0.3 ..... 139		
5.05 Timeliness of T&T data (0–18)* ..... 3.0 ..... 112			12.02 Attitude of population toward foreign visitors ..... 6.1 ..... 86		
			12.03 Extension of business trips recommended ..... 4.3 ..... 130		
<b>6th pillar: Air transport infrastructure ..... 2.3 ..... 113</b>			12.04 Degree of customer orientation ..... 4.3 ..... 98		
6.01 Quality of air transport infrastructure ..... 3.5 ..... 118					
6.02 Airline seat kms/week, dom., millions* ..... 5.5 ..... 57			<b>13th pillar: Natural resources ..... 3.2 ..... 90</b>		
6.03 Airline seat kms/week, int'l, millions* ..... 196.8 ..... 58			13.01 No. of World Heritage natural sites* ..... 1 ..... <b>45</b>		
6.04 Departures/1,000 pop.* ..... 0.1 ..... 128			13.02 Quality of the natural environment ..... 3.8 ..... 100		
6.05 Airport density/million pop.* ..... 0.1 ..... 138			13.03 Total known species* ..... 765 ..... <b>47</b>		
6.06 No. of operating airlines* ..... 28.0 ..... 61			13.04 Terrestrial biome protection (0–17%)* ..... 1.8 ..... 123		
6.07 International air transport network ..... 4.0 ..... 109			13.05 Marine protected areas, %* ..... 0.4 ..... 63		
<b>7th pillar: Ground transport infrastructure ..... 3.8 ..... 65</b>			<b>14th pillar: Cultural resources ..... 1.5 ..... 116</b>		
7.01 Quality of roads ..... 2.8 ..... 111			14.01 No. of World Heritage cultural sites* ..... 3 ..... 74		
7.02 Quality of railroad infrastructure ..... 2.5 ..... 71			14.02 Sports stadiums, seats/million pop.* ..... 2,079.8 ..... 137		
7.03 Quality of port infrastructure ..... 3.3 ..... 119			14.03 No. of int'l fairs and exhibitions* ..... 4.0 ..... 107		
7.04 Quality of ground transport network ..... 3.3 ..... 133			14.04 Creative industries exports, % of world total* ..... 0.0 ..... 63		
7.05 Road density/million pop.* ..... 166.0 ..... <b>19</b>					

# Barbados

## Key indicators

Population (millions), 2011 .....	0.3
Surface area (1,000 square kilometers), 2011 .....	0.4
Gross domestic product (current US\$ billions), 2011 .....	4.3
Gross domestic product (current PPP, \$) per capita, 2011 .....	24,989.0
Real GDP growth (percent), 2011 .....	0.6
Environmental Performance Index 2012, rank (out of 132 economies), 2011 .....	n/a

## Travel & Tourism indicators

### T&T industry, 2012 estimates

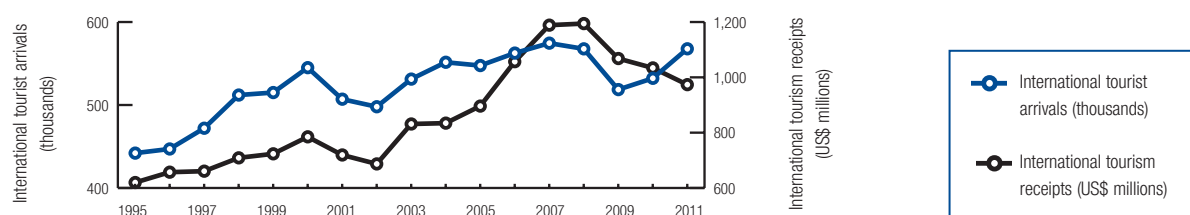
	Absolute value	Percent of total	T&T industry GDP growth forecast (2013–2022)
T&T industry GDP (US\$ millions) .....	536.1	12.6	2.6
T&T industry employment (1,000 jobs) .....	18.2	12.8	0.9

### T&T economy, 2012 estimates

T&T economy GDP (US\$ millions) .....	1,815	42.7	2.8
T&T economy employment (1,000 jobs) .....	60	41.9	0.9

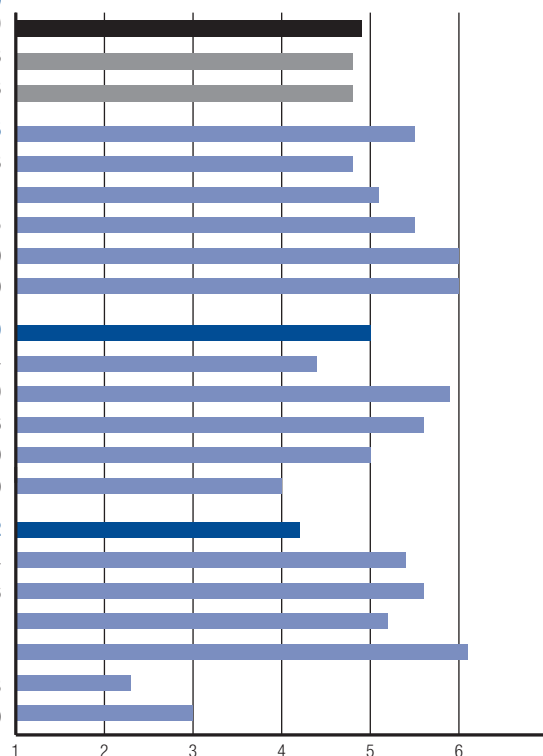
International tourist arrivals (thousands), 2011 ..... 567.7

International tourism receipts (US\$, millions), 2011 ..... 973.6



## The Travel & Tourism Competitiveness Index

	Rank (out of 140)	Score (1–7)
<b>2013 Travel &amp; Tourism Competitiveness Index .....</b>	<b>27</b>	<b>4.9</b>
2011 Travel & Tourism Competitiveness Index .....	28	4.8
2009 Travel & Tourism Competitiveness Index .....	30	4.8
<b>T&amp;T regulatory framework .....</b>	<b>13</b>	<b>5.5</b>
Policy rules and regulations .....	41	4.8
Environmental sustainability .....	27	5.1
Safety and security .....	32	5.5
Health and hygiene .....	28	6.0
Prioritization of Travel & Tourism .....	8	6.0
<b>Business environment and infrastructure .....</b>	<b>18</b>	<b>5.0</b>
Air transport infrastructure .....	32	4.4
Ground transport infrastructure .....	9	5.9
Tourism infrastructure .....	26	5.6
ICT infrastructure .....	19	5.0
Price competitiveness in the T&T industry .....	113	4.0
<b>T&amp;T human, cultural, and natural resources .....</b>	<b>50</b>	<b>4.2</b>
Human resources .....	23	5.4
Education and training .....	22	5.6
Availability of qualified labor .....	43	5.2
Affinity for Travel & Tourism .....	2	6.1
Natural resources .....	133	2.3
Cultural resources .....	50	3.0



**Note:** For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" on page 83.

# Barbados

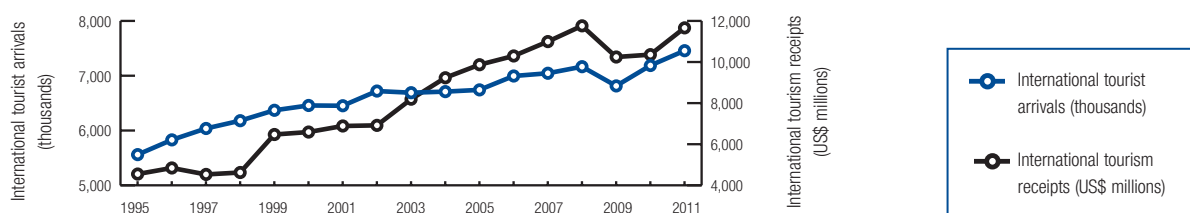
## The Travel & Tourism Competitiveness Index in detail

INDICATOR	SCORE	RANK	INDICATOR	SCORE	RANK
<b>1st pillar: Policy rules and regulations ..... 4.8 ..... 41</b>			<b>8th pillar: Tourism infrastructure ..... 5.6 ..... 26</b>		
1.01 Prevalence of foreign ownership ..... 5.5 ..... 19			8.01 Hotel rooms/100 pop.* ..... 2.5 ..... 7		
1.02 Property rights ..... 5.4 ..... 27			8.02 Presence of major car rental co. (1–7)* ..... 2 ..... 111		
1.03 Business impact of rules on FDI ..... 5.2 ..... 22			8.03 ATMs accepting Visa cards/million pop.* ..... 708.2 ..... 16		
1.04 Visa requirements, no. of countries* ..... 111.0 ..... 27					
1.05 Openness bilateral ASAs (0–38)* ..... 15.6 ..... 27			<b>9th pillar: ICT infrastructure ..... 5.0 ..... 19</b>		
1.06 Transparency of government policymaking ..... 5.2 ..... 18			9.01 ICT use for B-to-B transactions ..... 5.3 ..... 49		
1.07 No. of days to start a business* ..... 18 ..... 76			9.02 ICT use for B-to-C transactions ..... 4.7 ..... 60		
1.08 Cost to start a business, % GNI/capita* ..... 7.2 ..... 61			9.03 Individuals using the Internet, %* ..... 71.8 ..... 30		
1.09 GATS commitment restrictiveness (0–100)* ..... 0.0 ..... 117			9.04 Fixed telephone lines/100 pop.* ..... 51.4 ..... 12		
			9.05 Broadband Internet subscribers/100 pop.* ..... 22.1 ..... 29		
<b>2nd pillar: Environmental sustainability ..... 5.1 ..... 27</b>			9.06 Mobile telephone subscriptions/100 pop.* ..... 127.0 ..... 35		
2.01 Stringency of environmental regulation ..... 4.8 ..... 38			9.07 Mobile broadband subscriptions/100 pop.* ..... 77.1 ..... 7		
2.02 Enforcement of environmental regulation ..... 4.4 ..... 39					
2.03 Sustainability of T&T industry development ..... 5.7 ..... 5			<b>10th pillar: Price competitiveness in T&amp;T ind. .... 4.0 ..... 113</b>		
2.04 Carbon dioxide emission, million tons/capita* ..... 5.0 ..... 80			10.01 Ticket taxes and airport charges (0–100)* ..... 83.4 ..... 50		
2.05 Particulate matter concentration, µg/m³* ..... 34.3 ..... 84			10.02 Purchasing power parity* ..... 0.7 ..... 80		
2.06 Threatened species, %* ..... 2.1 ..... 10			10.04 Fuel price, US\$ cents/liter* ..... 114.0 ..... 77		
2.07 Environm. treaty ratification (0–25)* ..... 17 ..... 96			10.03 Extent and effect of taxation ..... 3.9 ..... 35		
			10.05 Hotel price index, US\$* ..... 329.4 ..... 116		
<b>3rd pillar: Safety and security ..... 5.5 ..... 32</b>					
3.01 Business costs of crime and violence ..... 4.8 ..... 72			<b>11th pillar: Human resources ..... 5.4 ..... 23</b>		
3.02 Reliability of police services ..... 5.9 ..... 22			<i>Education and training</i> ..... 5.6 ..... 22		
3.03 Road traffic accidents/100,000 pop.* ..... 12.2 ..... 37			11.01 Primary education enrollment, net %* ..... 95.0 ..... 55		
3.04 Business costs of terrorism ..... 6.0 ..... 46			11.02 Secondary education enrollment, gross %* ..... 100.6 ..... 29		
			11.03 Quality of the educational system ..... 5.4 ..... 7		
<b>4th pillar: Health and hygiene ..... 6.0 ..... 28</b>			11.04 Local availability specialized research & training ..... 4.6 ..... 42		
4.01 Physician density/1,000 pop.* ..... 1.8 ..... 65			11.05 Extent of staff training ..... 4.6 ..... 30		
4.02 Access to improved sanitation, % pop.* ..... 100.0 ..... 1			<i>Availability of qualified labor</i> ..... 5.2 ..... 43		
4.03 Access to improved drinking water, % pop.* ..... 100.0 ..... 1			11.06 Hiring and firing practices ..... 4.2 ..... 47		
4.04 Hospital beds/10,000 pop.* ..... 68.0 ..... 12			11.07 Ease of hiring foreign labor ..... 3.9 ..... 91		
			11.08 HIV prevalence, % adult pop.* ..... 1.4 ..... 114		
<b>5th pillar: Prioritization of Travel &amp; Tourism ..... 6.0 ..... 8</b>			11.09 Business impact of HIV/AIDS ..... 4.2 ..... 117		
5.01 Government prioritization of the T&T industry ..... 6.8 ..... 1			11.10 Life expectancy, years* ..... 76.7 ..... 40		
5.02 T&T gov't expenditure, % gov't budget* ..... 16.0 ..... 6					
5.03 Effectiveness of marketing to attract tourists ..... 5.8 ..... 7			<b>12th pillar: Affinity for Travel &amp; Tourism ..... 6.1 ..... 2</b>		
5.04 Comprehensiveness of T&T data (0–120)* ..... 42.0 ..... 114			12.01 Tourism openness, % of GDP* ..... 26.0 ..... 4		
5.05 Timeliness of T&T data (0–18)* ..... 14.0 ..... 69			12.02 Attitude of population toward foreign visitors ..... 6.6 ..... 11		
			12.03 Extension of business trips recommended ..... 6.2 ..... 10		
<b>6th pillar: Air transport infrastructure ..... 4.4 ..... 32</b>			12.04 Degree of customer orientation ..... 4.6 ..... 64		
6.01 Quality of air transport infrastructure ..... 6.3 ..... 8					
6.02 Airline seat kms/week, dom., millions* ..... 0.0 ..... 105			<b>13th pillar: Natural resources ..... 2.3 ..... 133</b>		
6.03 Airline seat kms/week, int'l, millions* ..... 83.8 ..... 81			13.01 No. of World Heritage natural sites* ..... 0 ..... 79		
6.04 Departures/1,000 pop.* ..... n/a ..... n/a			13.02 Quality of the natural environment ..... 5.2 ..... 32		
6.05 Airport density/million pop.* ..... 3.7 ..... 13			13.03 Total known species* ..... 242 ..... 135		
6.06 No. of operating airlines* ..... 13.0 ..... 97			13.04 Terrestrial biome protection (0–17%)* ..... 0.1 ..... 139		
6.07 International air transport network ..... 6.1 ..... 16			13.05 Marine protected areas, %* ..... 0.0 ..... 102		
<b>7th pillar: Ground transport infrastructure ..... 5.9 ..... 9</b>			<b>14th pillar: Cultural resources ..... 3.0 ..... 50</b>		
7.01 Quality of roads ..... 5.2 ..... 33			14.01 No. of World Heritage cultural sites* ..... 4 ..... 63		
7.02 Quality of railroad infrastructure ..... n/a ..... n/a			14.02 Sports stadiums, seats/million pop.* ..... 144,200.1 ..... 9		
7.03 Quality of port infrastructure ..... 5.6 ..... 17			14.03 No. of int'l fairs and exhibitions* ..... 4.3 ..... 102		
7.04 Quality of ground transport network ..... 5.8 ..... 16			14.04 Creative industries exports, % of world total* ..... 0.0 ..... 99		
7.05 Road density/million pop.* ..... 372.0 ..... 5					

Population (millions), 2011 .....	11.3
Surface area (1,000 square kilometers), 2011 .....	30.5
Gross domestic product (current US\$ billions), 2011 .....	514.6
Gross domestic product (current PPP, \$) per capita, 2011 .....	37,780.6
Real GDP growth (percent), 2011 .....	1.8
Environmental Performance Index 2012, rank (out of 132 economies), 2011 .....	24

T&T economy GDP (US\$ millions)	25,594	5.0	1.8
T&T economy employment (1,000 jobs)	243	5.4	0.2

International tourism receipts (US\$, millions), 2011.....	11,662.2
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A horizontal bar chart showing the number of respondents for each age group. The x-axis represents the number of respondents, ranging from 1 to 6. The y-axis lists the age groups. The bars are color-coded: black for '18-24', grey for '25-34', blue for '35-44', and dark blue for '45-54'. The '35-44' group has the highest number of respondents, with 6 respondents.

Age Group	Number of Respondents
18-24	5
25-34	5
35-44	6
45-54	5
55-64	5
65-74	5
75-84	6
85-94	4
95-104	5
105-114	4
115-124	3
125-134	5
135-144	6
145-154	5
155-164	5
165-174	3
175-184	6

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# Belgium

## The Travel & Tourism Competitiveness Index in detail

INDICATOR	SCORE	RANK
<b>1st pillar: Policy rules and regulations ..... 5.0 ..... 31</b>		
1.01 Prevalence of foreign ownership ..... 5.7 ..... <b>11</b>		
1.02 Property rights ..... 5.3 ..... 31		
1.03 Business impact of rules on FDI ..... 5.2 ..... 23		
1.04 Visa requirements, no. of countries* ..... 71.0 ..... 58		
1.05 Openness bilateral ASAs (0–38)* ..... 11.9 ..... 54		
1.06 Transparency of government policymaking ..... 4.4 ..... 60		
1.07 No. of days to start a business* ..... 4 ..... <b>8</b>		
1.08 Cost to start a business, % GNI/capita* ..... 5.2 ..... 56		
1.09 GATS commitment restrictiveness (0–100)* ..... 51.6 ..... 80		
<b>2nd pillar: Environmental sustainability ..... 5.5 ..... 13</b>		
2.01 Stringency of environmental regulation ..... 5.8 ..... <b>13</b>		
2.02 Enforcement of environmental regulation ..... 5.5 ..... <b>17</b>		
2.03 Sustainability of T&T industry development ..... 4.7 ..... 60		
2.04 Carbon dioxide emission, million tons/capita* ..... 9.8 ..... 117		
2.05 Particulate matter concentration, µg/m <sup>3</sup> * ..... 20.9 ..... 39		
2.06 Threatened species, %* ..... 1.7 ..... <b>6</b>		
2.07 Environm. treaty ratification (0–25)* ..... 22 ..... 20		
<b>3rd pillar: Safety and security ..... 5.9 ..... 16</b>		
3.01 Business costs of crime and violence ..... 5.8 ..... 21		
3.02 Reliability of police services ..... 5.7 ..... 24		
3.03 Road traffic accidents/100,000 pop.* ..... 10.2 ..... 27		
3.04 Business costs of terrorism ..... 6.2 ..... 26		
<b>4th pillar: Health and hygiene ..... 6.4 ..... 11</b>		
4.01 Physician density/1,000 pop.* ..... 3.0 ..... 30		
4.02 Access to improved sanitation, % pop.* ..... 100.0 ..... <b>1</b>		
4.03 Access to improved drinking water, % pop.* ..... 100.0 ..... <b>1</b>		
4.04 Hospital beds/10,000 pop.* ..... 65.0 ..... <b>17</b>		
<b>5th pillar: Prioritization of Travel &amp; Tourism ..... 4.4 ..... 66</b>		
5.01 Government prioritization of the T&T industry ..... 5.3 ..... 66		
5.02 T&T gov't expenditure, % gov't budget* ..... 3.2 ..... 70		
5.03 Effectiveness of marketing to attract tourists ..... 4.5 ..... 62		
5.04 Comprehensiveness of T&T data (0–120)* ..... 64.0 ..... 72		
5.05 Timeliness of T&T data (0–18)* ..... 14.5 ..... 65		
<b>6th pillar: Air transport infrastructure ..... 4.2 ..... 37</b>		
6.01 Quality of air transport infrastructure ..... 6.2 ..... <b>14</b>		
6.02 Airline seat kms/week, dom., millions* ..... 0.1 ..... 99		
6.03 Airline seat kms/week, int'l, millions* ..... 558.5 ..... 33		
6.04 Departures/1,000 pop.* ..... 13.1 ..... 32		
6.05 Airport density/million pop.* ..... 0.5 ..... 85		
6.06 No. of operating airlines* ..... 74.0 ..... <b>17</b>		
6.07 International air transport network ..... 6.1 ..... <b>15</b>		
<b>7th pillar: Ground transport infrastructure ..... 5.9 ..... 8</b>		
7.01 Quality of roads ..... 5.5 ..... 26		
7.02 Quality of railroad infrastructure ..... 5.2 ..... <b>13</b>		
7.03 Quality of port infrastructure ..... 6.3 ..... <b>6</b>		
7.04 Quality of ground transport network ..... 5.6 ..... 20		
7.05 Road density/million pop.* ..... 504.0 ..... <b>3</b>		

INDICATOR	SCORE	RANK
<b>8th pillar: Tourism infrastructure ..... 5.5 ..... 28</b>		
8.01 Hotel rooms/100 pop.* ..... 0.7 ..... 50		
8.02 Presence of major car rental co. (1–7)* ..... 6 ..... 32		
8.03 ATMs accepting Visa cards/million pop.* ..... 1,655.9 ..... <b>2</b>		
<b>9th pillar: ICT infrastructure ..... 4.7 ..... 26</b>		
9.01 ICT use for B-to-B transactions ..... 5.8 ..... 21		
9.02 ICT use for B-to-C transactions ..... 5.1 ..... 37		
9.03 Individuals using the Internet, %* ..... 78.0 ..... 19		
9.04 Fixed telephone lines/100 pop.* ..... 43.1 ..... 22		
9.05 Broadband Internet subscribers/100 pop.* ..... 33.0 ..... <b>9</b>		
9.06 Mobile telephone subscriptions/100 pop.* ..... 116.6 ..... 48		
9.07 Mobile broadband subscriptions/100 pop.* ..... 19.4 ..... 56		
<b>10th pillar: Price competitiveness in T&amp;T ind. .... 3.5 ..... 128</b>		
10.01 Ticket taxes and airport charges (0–100)* ..... 82.2 ..... 55		
10.02 Purchasing power parity* ..... 1.2 ..... 127		
10.04 Fuel price, US\$ cents/liter* ..... 162.0 ..... 121		
10.03 Extent and effect of taxation ..... 2.3 ..... 136		
10.05 Hotel price index, US\$* ..... 142.9 ..... 76		
<b>11th pillar: Human resources ..... 5.5 ..... 19</b>		
<i>Education and training</i> ..... 6.0 ..... <b>6</b>		
11.01 Primary education enrollment, net %* ..... 98.8 ..... <b>17</b>		
11.02 Secondary education enrollment, gross %* ..... 110.5 ..... <b>10</b>		
11.03 Quality of the educational system ..... 5.4 ..... <b>5</b>		
11.04 Local availability specialized research & training ..... 5.9 ..... <b>5</b>		
11.05 Extent of staff training ..... 4.8 ..... 20		
<i>Availability of qualified labor</i> ..... 5.1 ..... 60		
11.06 Hiring and firing practices ..... 2.9 ..... 128		
11.07 Ease of hiring foreign labor ..... 4.0 ..... 88		
11.08 HIV prevalence, % adult pop.* ..... 0.2 ..... 52		
11.09 Business impact of HIV/AIDS ..... 6.0 ..... 28		
11.10 Life expectancy, years* ..... 79.9 ..... 24		
<b>12th pillar: Affinity for Travel &amp; Tourism ..... 5.1 ..... 31</b>		
12.01 Tourism openness, % of GDP* ..... 6.6 ..... 40		
12.02 Attitude of population toward foreign visitors ..... 6.6 ..... 19		
12.03 Extension of business trips recommended ..... 5.4 ..... 66		
12.04 Degree of customer orientation ..... 5.6 ..... <b>10</b>		
<b>13th pillar: Natural resources ..... 3.0 ..... 103</b>		
13.01 No. of World Heritage natural sites* ..... 0 ..... 79		
13.02 Quality of the natural environment ..... 4.7 ..... 56		
13.03 Total known species* ..... 352 ..... 113		
13.04 Terrestrial biome protection (0–17%)* ..... 13.8 ..... 49		
13.05 Marine protected areas, %* ..... 0.0 ..... 93		
<b>14th pillar: Cultural resources ..... 6.0 ..... 9</b>		
14.01 No. of World Heritage cultural sites* ..... 20 ..... <b>12</b>		
14.02 Sports stadiums, seats/million pop.* ..... 79,950.0 ..... 28		
14.03 No. of int'l fairs and exhibitions* ..... 190.0 ..... 18		
14.04 Creative industries exports, % of world total* ..... 1.8 ..... <b>11</b>		

# Benin

## Key indicators

Population (millions), 2011 .....	9.1
Surface area (1,000 square kilometers), 2011 .....	112.6
Gross domestic product (current US\$ billions), 2011 .....	7.3
Gross domestic product (current PPP, \$) per capita, 2011 .....	1,620.4
Real GDP growth (percent), 2011 .....	3.5
Environmental Performance Index 2012, rank (out of 132 economies), 2011 .....	80

## Travel & Tourism indicators

### T&T industry, 2012 estimates

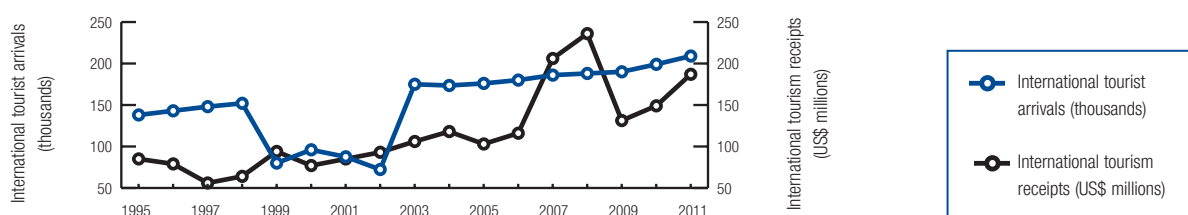
	Absolute value	Percent of total	T&T industry GDP growth forecast (2013–2022)
T&T industry GDP (US\$ millions) .....	197.8	2.6	3.9
T&T industry employment (1,000 jobs) .....	42.9	2.2	2.5

### T&T economy, 2012 estimates

T&T economy GDP (US\$ millions) .....	498	6.5	4.2
T&T economy employment (1,000 jobs) .....	112	5.6	2.7

International tourist arrivals (thousands), 2011 ..... 209.0

International tourism receipts (US\$, millions), 2011 ..... 187.0



## The Travel & Tourism Competitiveness Index

	Rank (out of 140)	Score (1–7)
<b>2013 Travel &amp; Tourism Competitiveness Index .....</b>	<b>130</b>	<b>3.1</b>
2011 Travel & Tourism Competitiveness Index .....	120	3.3
2009 Travel & Tourism Competitiveness Index .....	120	3.2

### T&T regulatory framework ..... 127 ..... 3.5

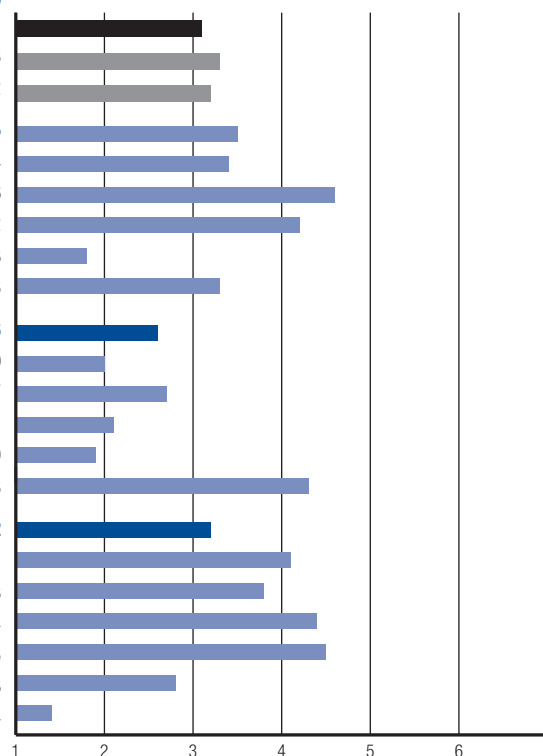
Policy rules and regulations .....	131	3.4
Environmental sustainability .....	64	4.6
Safety and security .....	101	4.2
Health and hygiene .....	132	1.8
Prioritization of Travel & Tourism .....	122	3.3

### Business environment and infrastructure ..... 130 ..... 2.6

Air transport infrastructure .....	130	2.0
Ground transport infrastructure .....	122	2.7
Tourism infrastructure .....	115	2.1
ICT infrastructure .....	118	1.9
Price competitiveness in the T&T industry .....	92	4.3

### T&T human, cultural, and natural resources ..... 126 ..... 3.2

Human resources .....	113	4.1
Education and training .....	117	3.8
Availability of qualified labor .....	123	4.4
Affinity for Travel & Tourism .....	88	4.5
Natural resources .....	112	2.8
Cultural resources .....	124	1.4



**Note:** For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" on page 83.

# Benin

## The Travel & Tourism Competitiveness Index in detail

INDICATOR	SCORE	RANK	INDICATOR	SCORE	RANK
<b>1st pillar: Policy rules and regulations ..... 3.4 ..... 131</b>			<b>8th pillar: Tourism infrastructure ..... 2.1 ..... 115</b>		
1.01 Prevalence of foreign ownership ..... 3.5 ..... 125			8.01 Hotel rooms/100 pop.* ..... 0.1 ..... 105		
1.02 Property rights ..... 3.9 ..... 88			8.02 Presence of major car rental co. (1–7)* ..... 3 ..... 97		
1.03 Business impact of rules on FDI ..... 3.6 ..... 121			8.03 ATMs accepting Visa cards/million pop.* ..... 23.7 ..... 116		
1.04 Visa requirements, no. of countries* ..... 21.0 ..... 122					
1.05 Openness bilateral ASAs (0–38)* ..... 4.4 ..... 129			<b>9th pillar: ICT infrastructure ..... 1.9 ..... 118</b>		
1.06 Transparency of government policymaking ..... 3.8 ..... 105			9.01 ICT use for B-to-B transactions ..... 4.2 ..... 121		
1.07 No. of days to start a business* ..... 26 ..... 98			9.02 ICT use for B-to-C transactions ..... 4.3 ..... 84		
1.08 Cost to start a business, % GNI/capita* ..... 126.8 ..... 135			9.03 Individuals using the Internet, %* ..... 3.5 ..... 129		
1.09 GATS commitment restrictiveness (0–100)* ..... 82.7 ..... 9			9.04 Fixed telephone lines/100 pop.* ..... 1.7 ..... 120		
			9.05 Broadband Internet subscribers/100 pop.* ..... 0.0 ..... 128		
<b>2nd pillar: Environmental sustainability ..... 4.6 ..... 64</b>			9.06 Mobile telephone subscriptions/100 pop.* ..... 85.3 ..... 100		
2.01 Stringency of environmental regulation ..... 3.0 ..... 121			9.07 Mobile broadband subscriptions/100 pop.* ..... 0.0 ..... 128		
2.02 Enforcement of environmental regulation ..... 3.0 ..... 102					
2.03 Sustainability of T&T industry development ..... 3.2 ..... 123			<b>10th pillar: Price competitiveness in T&amp;T ind. .... 4.3 ..... 92</b>		
2.04 Carbon dioxide emission, million tons/capita* ..... 0.5 ..... 26			10.01 Ticket taxes and airport charges (0–100)* ..... 64.4 ..... 112		
2.05 Particulate matter concentration, µg/m <sup>3</sup> * ..... 48.1 ..... 100			10.02 Purchasing power parity* ..... 0.5 ..... 29		
2.06 Threatened species, %* ..... 2.9 ..... 28			10.04 Fuel price, US\$ cents/liter* ..... 121.0 ..... 82		
2.07 Environm. treaty ratification (0–25)* ..... 22 ..... 20			10.03 Extent and effect of taxation ..... 2.8 ..... 120		
			10.05 Hotel price index, US\$* ..... n/a ..... n/a		
<b>3rd pillar: Safety and security ..... 4.2 ..... 101</b>					
3.01 Business costs of crime and violence ..... 4.5 ..... 86			<b>11th pillar: Human resources ..... 4.1 ..... 113</b>		
3.02 Reliability of police services ..... 4.4 ..... 61			<i>Education and training</i> ..... 3.8 ..... 117		
3.03 Road traffic accidents/100,000 pop.* ..... 31.2 ..... 117			11.01 Primary education enrollment, net %* ..... 93.8 ..... 66		
3.04 Business costs of terrorism ..... 5.1 ..... 97			11.02 Secondary education enrollment, gross %* ..... 37.1 ..... 124		
			11.03 Quality of the educational system ..... 3.6 ..... 70		
<b>4th pillar: Health and hygiene ..... 1.8 ..... 132</b>			11.04 Local availability specialized research & training ..... 4.1 ..... 76		
4.01 Physician density/1,000 pop.* ..... 0.1 ..... 127			11.05 Extent of staff training ..... 3.1 ..... 130		
4.02 Access to improved sanitation, % pop.* ..... 13.0 ..... 135			<i>Availability of qualified labor</i> ..... 4.4 ..... 123		
4.03 Access to improved drinking water, % pop.* ..... 75.0 ..... 118			11.06 Hiring and firing practices ..... 4.0 ..... 63		
4.04 Hospital beds/10,000 pop.* ..... 5.0 ..... 128			11.07 Ease of hiring foreign labor ..... 4.4 ..... 49		
			11.08 HIV prevalence, % adult pop.* ..... 1.2 ..... 108		
<b>5th pillar: Prioritization of Travel &amp; Tourism ..... 3.3 ..... 122</b>			11.09 Business impact of HIV/AIDS ..... 4.2 ..... 116		
5.01 Government prioritization of the T&T industry ..... 4.1 ..... 123			11.10 Life expectancy, years* ..... 56.0 ..... 121		
5.02 T&T gov't expenditure, % gov't budget* ..... 3.1 ..... 72					
5.03 Effectiveness of marketing to attract tourists ..... 3.4 ..... 121			<b>12th pillar: Affinity for Travel &amp; Tourism ..... 4.5 ..... 88</b>		
5.04 Comprehensiveness of T&T data (0–120)* ..... 57.0 ..... 89			12.01 Tourism openness, % of GDP* ..... 3.1 ..... 94		
5.05 Timeliness of T&T data (0–18)* ..... 3.0 ..... 112			12.02 Attitude of population toward foreign visitors ..... 6.1 ..... 89		
			12.03 Extension of business trips recommended ..... 5.5 ..... 58		
<b>6th pillar: Air transport infrastructure ..... 2.0 ..... 130</b>			12.04 Degree of customer orientation ..... 4.5 ..... 88		
6.01 Quality of air transport infrastructure ..... 3.4 ..... 121					
6.02 Airline seat kms/week, dom., millions* ..... 0.0 ..... 105			<b>13th pillar: Natural resources ..... 2.8 ..... 112</b>		
6.03 Airline seat kms/week, int'l, millions* ..... 19.1 ..... 118			13.01 No. of World Heritage natural sites* ..... 0 ..... 79		
6.04 Departures/1,000 pop.* ..... 0.1 ..... 123			13.02 Quality of the natural environment ..... 2.8 ..... 132		
6.05 Airport density/million pop.* ..... 0.1 ..... 132			13.03 Total known species* ..... 696 ..... 53		
6.06 No. of operating airlines* ..... 14.0 ..... 94			13.04 Terrestrial biome protection (0–17%)* ..... 16.8 ..... 22		
6.07 International air transport network ..... 3.6 ..... 121			13.05 Marine protected areas, %* ..... 0.0 ..... 104		
<b>7th pillar: Ground transport infrastructure ..... 2.7 ..... 122</b>			<b>14th pillar: Cultural resources ..... 1.4 ..... 124</b>		
7.01 Quality of roads ..... 3.1 ..... 102			14.01 No. of World Heritage cultural sites* ..... 2 ..... 88		
7.02 Quality of railroad infrastructure ..... 1.6 ..... 105			14.02 Sports stadiums, seats/million pop.* ..... 13,945.2 ..... 100		
7.03 Quality of port infrastructure ..... 3.7 ..... 94			14.03 No. of int'l fairs and exhibitions* ..... 0.7 ..... 125		
7.04 Quality of ground transport network ..... 3.7 ..... 117			14.04 Creative industries exports, % of world total* ..... 0.0 ..... 125		
7.05 Road density/million pop.* ..... 17.0 ..... 94					



# Bolivia

## Key indicators

Population (millions), 2011 .....	10.2
Surface area (1,000 square kilometers), 2011 .....	1,098.6
Gross domestic product (current US\$ billions), 2011 .....	24.1
Gross domestic product (current PPP, \$) per capita, 2011 .....	4,793.0
Real GDP growth (percent), 2011 .....	5.2
Environmental Performance Index 2012, rank (out of 132 economies), 2011 .....	62

## Travel & Tourism indicators

### T&T industry, 2012 estimates

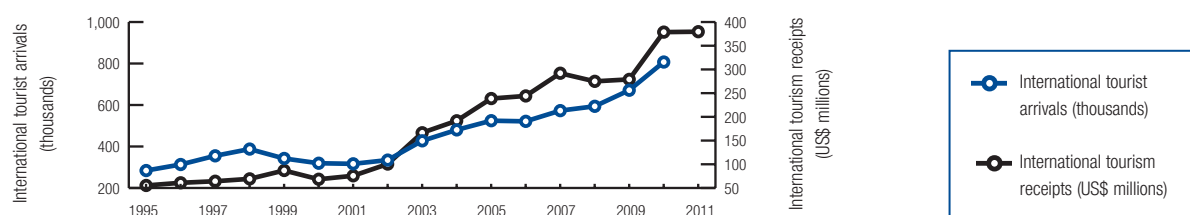
	Absolute value	Percent of total	T&T industry GDP growth forecast (2013–2022)
T&T industry GDP (US\$ millions).....	621.2	2.6	3.2
T&T industry employment (1,000 jobs) .....	100.7	2.3	2.1

### T&T economy, 2012 estimates

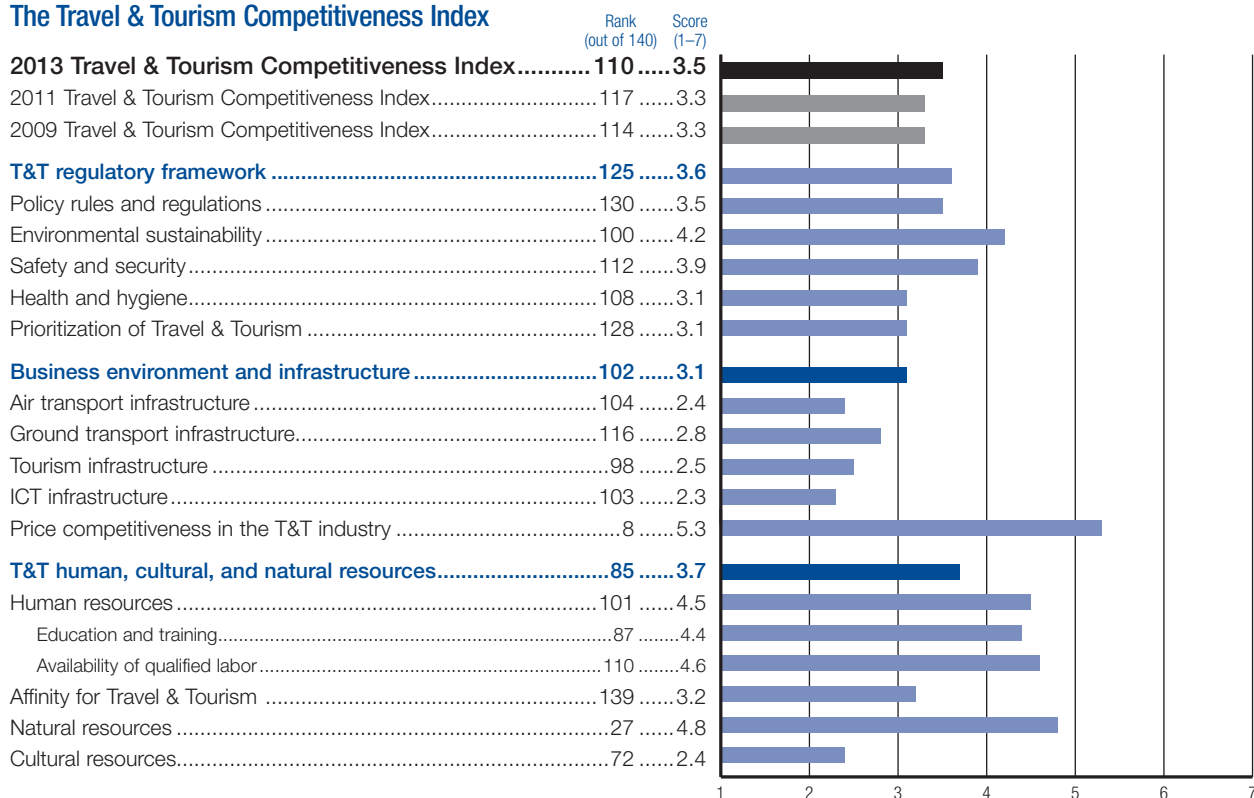
T&T economy GDP (US\$ millions) .....	1,519	6.4	3.3
T&T economy employment (1,000 jobs) .....	253	5.7	2.2

International tourist arrivals (thousands), 2010.....807.1

International tourism receipts (US\$, millions), 2011.....379.6



## The Travel & Tourism Competitiveness Index



**Note:** For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" on page 83.

## The Travel &amp; Tourism Competitiveness Index in detail

INDICATOR	SCORE	RANK	INDICATOR	SCORE	RANK
<b>1st pillar: Policy rules and regulations ..... 3.5 ..... 130</b>			<b>8th pillar: Tourism infrastructure ..... 2.5 ..... 98</b>		
1.01 Prevalence of foreign ownership ..... 3.5 ..... 127			8.01 Hotel rooms/100 pop.* ..... 0.2 ..... 86		
1.02 Property rights ..... 3.2 ..... 125			8.02 Presence of major car rental co. (1–7)* ..... 3 ..... 97		
1.03 Business impact of rules on FDI ..... 3.4 ..... 126			8.03 ATMs accepting Visa cards/million pop.* ..... 149.1 ..... 92		
1.04 Visa requirements, no. of countries* ..... 134.0 ..... <b>21</b>					
1.05 Openness bilateral ASAs (0–38)* ..... 9.8 ..... 84			<b>9th pillar: ICT infrastructure ..... 2.3 ..... 103</b>		
1.06 Transparency of government policymaking ..... 3.5 ..... 126			9.01 ICT use for B-to-B transactions ..... 3.9 ..... 130		
1.07 No. of days to start a business* ..... 50 ..... 127			9.02 ICT use for B-to-C transactions ..... 4.0 ..... 100		
1.08 Cost to start a business, % GNI/capita* ..... 74.1 ..... 125			9.03 Individuals using the Internet, %* ..... 30.0 ..... 90		
1.09 GATS commitment restrictiveness (0–100)* ..... 48.5 ..... 88			9.04 Fixed telephone lines/100 pop.* ..... 8.7 ..... 96		
			9.05 Broadband Internet subscribers/100 pop.* ..... 0.7 ..... 107		
<b>2nd pillar: Environmental sustainability ..... 4.2 ..... 100</b>			9.06 Mobile telephone subscriptions/100 pop.* ..... 82.8 ..... 104		
2.01 Stringency of environmental regulation ..... 3.6 ..... 90			9.07 Mobile broadband subscriptions/100 pop.* ..... 2.8 ..... 99		
2.02 Enforcement of environmental regulation ..... 3.3 ..... 91					
2.03 Sustainability of T&T industry development ..... 3.4 ..... 121			<b>10th pillar: Price competitiveness in T&amp;T ind. .... 5.3 ..... 8</b>		
2.04 Carbon dioxide emission, million tons/capita* ..... 1.3 ..... <b>44</b>			10.01 Ticket taxes and airport charges (0–100)* ..... 71.1 ..... 101		
2.05 Particulate matter concentration, µg/m <sup>3</sup> * ..... 60.5 ..... 113			10.02 Purchasing power parity* ..... 0.5 ..... <b>26</b>		
2.06 Threatened species, %* ..... 5.3 ..... 77			10.04 Fuel price, US\$ cents/liter* ..... 54.0 ..... <b>16</b>		
2.07 Environm. treaty ratification (0–25)* ..... 18 ..... 84			10.03 Extent and effect of taxation ..... 3.4 ..... 72		
			10.05 Hotel price index, US\$* ..... 60.8 ..... <b>3</b>		
<b>3rd pillar: Safety and security ..... 3.9 ..... 112</b>					
3.01 Business costs of crime and violence ..... 3.8 ..... 105			<b>11th pillar: Human resources ..... 4.5 ..... 101</b>		
3.02 Reliability of police services ..... 3.0 ..... 118			<i>Education and training</i> ..... 4.4 ..... 87		
3.03 Road traffic accidents/100,000 pop.* ..... 16.7 ..... 73			11.01 Primary education enrollment, net %* ..... 94.2 ..... 61		
3.04 Business costs of terrorism ..... 3.9 ..... 132			11.02 Secondary education enrollment, gross %* ..... 80.2 ..... 90		
			11.03 Quality of the educational system ..... 3.3 ..... 95		
<b>4th pillar: Health and hygiene ..... 3.1 ..... 108</b>			11.04 Local availability specialized research & training... 3.5 ..... 106		
4.01 Physician density/1,000 pop.* ..... 1.2 ..... 81			11.05 Extent of staff training ..... 3.6 ..... 101		
4.02 Access to improved sanitation, % pop.* ..... 27.0 ..... 123			<i>Availability of qualified labor</i> ..... 4.6 ..... 110		
4.03 Access to improved drinking water, % pop.* ..... 88.0 ..... 97			11.06 Hiring and firing practices ..... 3.6 ..... 91		
4.04 Hospital beds/10,000 pop.* ..... 11.0 ..... 110			11.07 Ease of hiring foreign labor ..... 3.6 ..... 106		
			11.08 HIV prevalence, % adult pop.* ..... 0.2 ..... 52		
<b>5th pillar: Prioritization of Travel &amp; Tourism ..... 3.1 ..... 128</b>			11.09 Business impact of HIV/AIDS ..... 3.0 ..... 130		
5.01 Government prioritization of the T&T industry ..... 3.3 ..... 136			11.10 Life expectancy, years* ..... 66.6 ..... 107		
5.02 T&T gov't expenditure, % gov't budget* ..... 3.1 ..... 71					
5.03 Effectiveness of marketing to attract tourists ..... 3.3 ..... 122			<b>12th pillar: Affinity for Travel &amp; Tourism ..... 3.2 ..... 139</b>		
5.04 Comprehensiveness of T&T data (0–120)* ..... 58.0 ..... 86			12.01 Tourism openness, % of GDP* ..... 2.8 ..... 105		
5.05 Timeliness of T&T data (0–18)* ..... 3.0 ..... 112			12.02 Attitude of population toward foreign visitors ..... 4.1 ..... 140		
			12.03 Extension of business trips recommended ..... 3.6 ..... 138		
<b>6th pillar: Air transport infrastructure ..... 2.4 ..... 104</b>			12.04 Degree of customer orientation ..... 3.5 ..... 136		
6.01 Quality of air transport infrastructure ..... 3.5 ..... 116					
6.02 Airline seat kms/week, dom., millions* ..... 23.6 ..... <b>42</b>			<b>13th pillar: Natural resources ..... 4.8 ..... 27</b>		
6.03 Airline seat kms/week, int'l, millions* ..... 44.6 ..... 95			13.01 No. of World Heritage natural sites* ..... 1 ..... <b>45</b>		
6.04 Departures/1,000 pop.* ..... 3.6 ..... 67			13.02 Quality of the natural environment ..... 3.8 ..... 101		
6.05 Airport density/million pop.* ..... 1.3 ..... <b>34</b>			13.03 Total known species* ..... 2,016 ..... <b>8</b>		
6.06 No. of operating airlines* ..... 15.0 ..... 91			13.04 Terrestrial biome protection (0–17%)* ..... 14.7 ..... <b>37</b>		
6.07 International air transport network ..... 3.5 ..... 125			13.05 Marine protected areas, %* ..... n/a ..... n/a		
<b>7th pillar: Ground transport infrastructure ..... 2.8 ..... 116</b>			<b>14th pillar: Cultural resources ..... 2.4 ..... 72</b>		
7.01 Quality of roads ..... 3.1 ..... 100			14.01 No. of World Heritage cultural sites* ..... 8 ..... <b>33</b>		
7.02 Quality of railroad infrastructure ..... 3.0 ..... 57			14.02 Sports stadiums, seats/million pop.* ..... 27,160.7 ..... 80		
7.03 Quality of port infrastructure ..... 3.3 ..... 120			14.03 No. of int'l fairs and exhibitions* ..... 9.3 ..... 80		
7.04 Quality of ground transport network ..... 3.4 ..... 129			14.04 Creative industries exports, % of world total* ..... 0.0 ..... 82		
7.05 Road density/million pop.* ..... 7.0 ..... 124					

# Bosnia and Herzegovina

## Key indicators

Population (millions), 2011 .....	3.9
Surface area (1,000 square kilometers), 2011 .....	51.2
Gross domestic product (current US\$ billions), 2011 .....	18.1
Gross domestic product (current PPP, \$) per capita, 2011 .....	8,115.2
Real GDP growth (percent), 2011 .....	1.3
Environmental Performance Index 2012, rank (out of 132 economies), 2011 .....	124

## Travel & Tourism indicators

### T&T industry, 2012 estimates

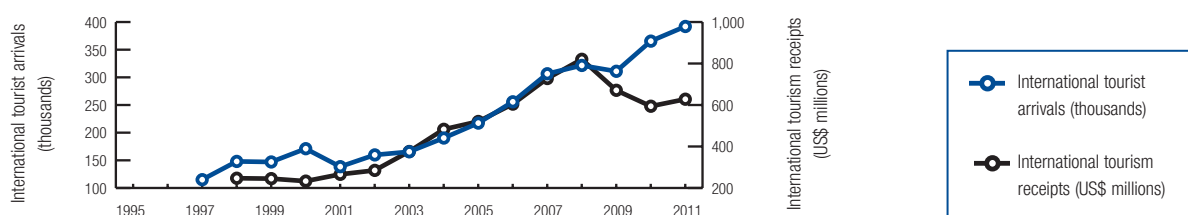
	Absolute value	Percent of total	T&T industry GDP growth forecast (2013–2022)
T&T industry GDP (US\$ millions) .....	386.4	2.0	5.9
T&T industry employment (1,000 jobs) .....	20.9	1.8	1.9

### T&T economy, 2012 estimates

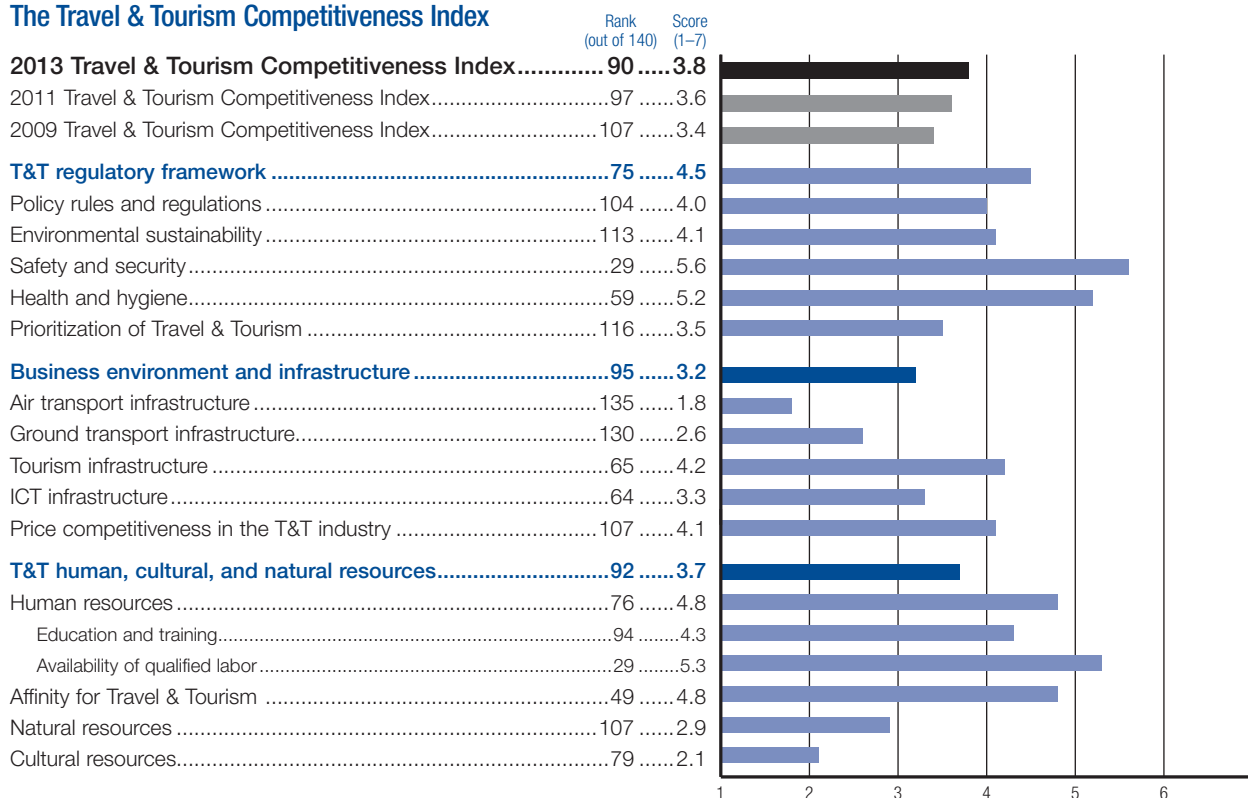
T&T economy GDP (US\$ millions) .....	1,398	7.4	6.2
T&T economy employment (1,000 jobs) .....	76	6.6	2.0

International tourist arrivals (thousands), 2011 .....391.9

International tourism receipts (US\$, millions), 2011 .....627.9



## The Travel & Tourism Competitiveness Index



**Note:** For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" on page 83.

# Bosnia and Herzegovina

## The Travel & Tourism Competitiveness Index in detail

INDICATOR	SCORE	RANK	INDICATOR	SCORE	RANK
<b>1st pillar: Policy rules and regulations</b> ..... 4.0 ..... 104			<b>8th pillar: Tourism infrastructure</b> ..... 4.2 ..... 65		
1.01 Prevalence of foreign ownership ..... 4.4 ..... 85			8.01 Hotel rooms/100 pop.* ..... 0.3 ..... 76		
1.02 Property rights ..... 3.3 ..... 118			8.02 Presence of major car rental co. (1–7)* ..... 7 ..... 1		
1.03 Business impact of rules on FDI ..... 4.0 ..... 105			8.03 ATMs accepting Visa cards/million pop.* ..... 309.7 ..... 63		
1.04 Visa requirements, no. of countries* ..... 69.0 ..... 90					
1.05 Openness bilateral ASAs (0–38)* ..... 10.0 ..... 80			<b>9th pillar: ICT infrastructure</b> ..... 3.3 ..... 64		
1.06 Transparency of government policymaking ..... 3.8 ..... 109			9.01 ICT use for B-to-B transactions ..... 4.5 ..... 104		
1.07 No. of days to start a business* ..... 37 ..... 118			9.02 ICT use for B-to-C transactions ..... 4.2 ..... 88		
1.08 Cost to start a business, % GNI/capita* ..... 14.9 ..... 88			9.03 Individuals using the Internet, %* ..... 60.0 ..... 42		
1.09 GATS commitment restrictiveness (0–100)* ..... n/a ..... n/a			9.04 Fixed telephone lines/100 pop.* ..... 25.5 ..... 48		
			9.05 Broadband Internet subscribers/100 pop.* ..... 9.7 ..... 59		
<b>2nd pillar: Environmental sustainability</b> ..... 4.1 ..... 113			9.06 Mobile telephone subscriptions/100 pop.* ..... 84.5 ..... 102		
2.01 Stringency of environmental regulation ..... 2.8 ..... 129			9.07 Mobile broadband subscriptions/100 pop.* ..... 9.2 ..... 77		
2.02 Enforcement of environmental regulation ..... 2.9 ..... 109					
2.03 Sustainability of T&T industry development ..... 3.6 ..... 112			<b>10th pillar: Price competitiveness in T&amp;T ind.</b> ..... 4.1 ..... 107		
2.04 Carbon dioxide emission, million tons/capita* ..... 8.3 ..... 108			10.01 Ticket taxes and airport charges (0–100)* ..... 56.9 ..... 123		
2.05 Particulate matter concentration, µg/m <sup>3</sup> * ..... 18.8 ..... 33			10.02 Purchasing power parity* ..... 0.5 ..... 35		
2.06 Threatened species, %* ..... 2.9 ..... 30			10.04 Fuel price, US\$ cents/liter* ..... 142.0 ..... 99		
2.07 Environm. treaty ratification (0–25)* ..... 14 ..... 130			10.03 Extent and effect of taxation ..... 3.1 ..... 105		
			10.05 Hotel price index, US\$* ..... n/a ..... n/a		
<b>3rd pillar: Safety and security</b> ..... 5.6 ..... 29					
3.01 Business costs of crime and violence ..... 5.4 ..... 38			<b>11th pillar: Human resources</b> ..... 4.8 ..... 76		
3.02 Reliability of police services ..... 4.9 ..... 45			<i>Education and training</i> ..... 4.3 ..... 94		
3.03 Road traffic accidents/100,000 pop.* ..... 10.9 ..... 30			11.01 Primary education enrollment, net %* ..... 87.0 ..... 109		
3.04 Business costs of terrorism ..... 6.4 ..... 10			11.02 Secondary education enrollment, gross %* ..... 91.1 ..... 59		
			11.03 Quality of the educational system ..... 3.1 ..... 105		
<b>4th pillar: Health and hygiene</b> ..... 5.2 ..... 59			11.04 Local availability specialized research & training ..... 3.4 ..... 112		
4.01 Physician density/1,000 pop.* ..... 1.6 ..... 71			11.05 Extent of staff training ..... 3.5 ..... 107		
4.02 Access to improved sanitation, % pop.* ..... 95.0 ..... 52			<i>Availability of qualified labor</i> ..... 5.3 ..... 29		
4.03 Access to improved drinking water, % pop.* ..... 99.0 ..... 42			11.06 Hiring and firing practices ..... 4.4 ..... 38		
4.04 Hospital beds/10,000 pop.* ..... 34.0 ..... 53			11.07 Ease of hiring foreign labor ..... 4.1 ..... 76		
			11.08 HIV prevalence, % adult pop.* ..... n/a ..... 1		
<b>5th pillar: Prioritization of Travel &amp; Tourism</b> ..... 3.5 ..... 116			11.09 Business impact of HIV/AIDS ..... 6.7 ..... 2		
5.01 Government prioritization of the T&T industry ..... 3.8 ..... 133			11.10 Life expectancy, years* ..... 75.6 ..... 48		
5.02 T&T gov't expenditure, % gov't budget* ..... 1.1 ..... 129					
5.03 Effectiveness of marketing to attract tourists ..... 3.8 ..... 105			<b>12th pillar: Affinity for Travel &amp; Tourism</b> ..... 4.8 ..... 49		
5.04 Comprehensiveness of T&T data (0–120)* ..... 48.0 ..... 100			12.01 Tourism openness, % of GDP* ..... 4.5 ..... 73		
5.05 Timeliness of T&T data (0–18)* ..... 15.5 ..... 48			12.02 Attitude of population toward foreign visitors ..... 6.6 ..... 8		
			12.03 Extension of business trips recommended ..... 5.9 ..... 28		
<b>6th pillar: Air transport infrastructure</b> ..... 1.8 ..... 135			12.04 Degree of customer orientation ..... 4.5 ..... 82		
6.01 Quality of air transport infrastructure ..... 2.3 ..... 139					
6.02 Airline seat kms/week, dom., millions* ..... 0.0 ..... 104			<b>13th pillar: Natural resources</b> ..... 2.9 ..... 107		
6.03 Airline seat kms/week, int'l, millions* ..... 7.1 ..... 133			13.01 No. of World Heritage natural sites* ..... 0 ..... 79		
6.04 Departures/1,000 pop.* ..... 0.5 ..... 110			13.02 Quality of the natural environment ..... 5.5 ..... 20		
6.05 Airport density/million pop.* ..... 0.8 ..... 56			13.03 Total known species* ..... 378 ..... 107		
6.06 No. of operating airlines* ..... 12.5 ..... 101			13.04 Terrestrial biome protection (0–17%)* ..... 0.5 ..... 134		
6.07 International air transport network ..... 2.6 ..... 139			13.05 Marine protected areas, %* ..... 0.8 ..... 47		
<b>7th pillar: Ground transport infrastructure</b> ..... 2.6 ..... 130			<b>14th pillar: Cultural resources</b> ..... 2.1 ..... 79		
7.01 Quality of roads ..... 2.5 ..... 132			14.01 No. of World Heritage cultural sites* ..... 2 ..... 88		
7.02 Quality of railroad infrastructure ..... 2.5 ..... 72			14.02 Sports stadiums, seats/million pop.* ..... 72,431.1 ..... 33		
7.03 Quality of port infrastructure ..... 1.7 ..... 138			14.03 No. of int'l fairs and exhibitions* ..... 7.0 ..... 86		
7.04 Quality of ground transport network ..... 3.6 ..... 121			14.04 Creative industries exports, % of world total* ..... 0.0 ..... 69		
7.05 Road density/million pop.* ..... 43.0 ..... 61					

# Botswana

## Key indicators

Population (millions), 2011 .....	2.0
Surface area (1,000 square kilometers), 2011 .....	581.7
Gross domestic product (current US\$ billions), 2011 .....	17.7
Gross domestic product (current PPP, \$) per capita, 2011 .....	16,105.2
Real GDP growth (percent), 2011 .....	5.1
Environmental Performance Index 2012, rank (out of 132 economies), 2011 .....	66

## Travel & Tourism indicators

### T&T industry, 2012 estimates

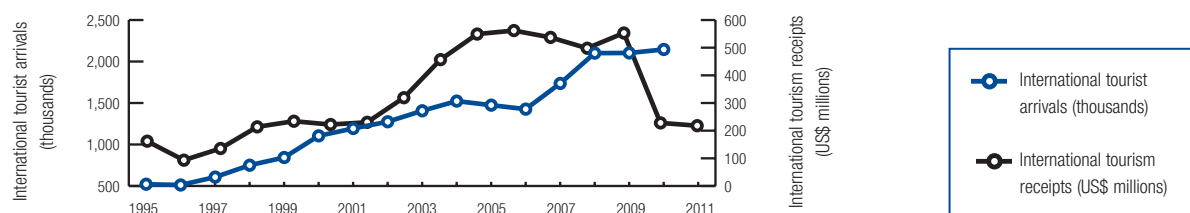
	Absolute value	Percent of total	T&T industry GDP growth forecast (2013–2022)
T&T industry GDP (US\$ millions).....	524.3	2.5	5.2
T&T industry employment (1,000 jobs) .....	20.3	3.3	3.2

### T&T economy, 2012 estimates

T&T economy GDP (US\$ millions) .....	1,429	6.8	5.6
T&T economy employment (1,000 jobs) .....	49	8.0	4.2

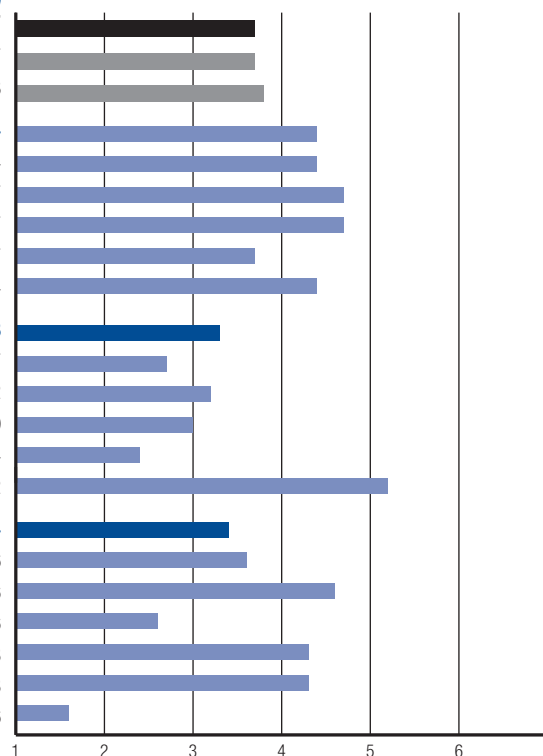
International tourist arrivals (thousands), 2010.....2,145.1

International tourism receipts (US\$, millions), 2010.....218.0



## The Travel & Tourism Competitiveness Index

	Rank (out of 140)	Score (1–7)
<b>2013 Travel &amp; Tourism Competitiveness Index.....</b>	<b>94</b>	<b>3.7</b>
2011 Travel & Tourism Competitiveness Index.....	91	3.7
2009 Travel & Tourism Competitiveness Index.....	79	3.8
<b>T&amp;T regulatory framework .....</b>	<b>84</b>	<b>4.4</b>
Policy rules and regulations .....	72	4.4
Environmental sustainability .....	55	4.7
Safety and security.....	75	4.7
Health and hygiene.....	97	3.7
Prioritization of Travel & Tourism .....	72	4.4
<b>Business environment and infrastructure .....</b>	<b>91</b>	<b>3.3</b>
Air transport infrastructure .....	89	2.7
Ground transport infrastructure.....	83	3.2
Tourism infrastructure .....	89	3.0
ICT infrastructure .....	99	2.4
Price competitiveness in the T&T industry .....	12	5.2
<b>T&amp;T human, cultural, and natural resources.....</b>	<b>112</b>	<b>3.4</b>
Human resources .....	128	3.6
Education and training.....	78	4.6
Availability of qualified labor.....	138	2.6
Affinity for Travel & Tourism .....	105	4.3
Natural resources .....	39	4.3
Cultural resources.....	109	1.6



**Note:** For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" on page 83.

# Botswana

## The Travel & Tourism Competitiveness Index in detail

INDICATOR	SCORE	RANK	INDICATOR	SCORE	RANK
<b>1st pillar: Policy rules and regulations ..... 4.4 ..... 72</b>			<b>8th pillar: Tourism infrastructure ..... 3.0 ..... 89</b>		
1.01 Prevalence of foreign ownership ..... 5.3 ..... <b>35</b>			8.01 Hotel rooms/100 pop.* ..... 0.3 ..... 72		
1.02 Property rights ..... 4.9 ..... <b>45</b>			8.02 Presence of major car rental co. (1–7)* ..... 4 ..... 82		
1.03 Business impact of rules on FDI ..... 4.8 ..... <b>48</b>			8.03 ATMs accepting Visa cards/million pop.* ..... 152.7 ..... 91		
1.04 Visa requirements, no. of countries* ..... 94.0 ..... <b>38</b>					
1.05 Openness bilateral ASAs (0–38)* ..... 6.5 ..... 120			<b>9th pillar: ICT infrastructure ..... 2.4 ..... 99</b>		
1.06 Transparency of government policymaking ..... 4.7 ..... <b>42</b>			9.01 ICT use for B-to-B transactions ..... 4.2 ..... 119		
1.07 No. of days to start a business* ..... 61 ..... 131			9.02 ICT use for B-to-C transactions ..... 3.8 ..... 107		
1.08 Cost to start a business, % GNI/capita* ..... 1.6 ..... <b>22</b>			9.03 Individuals using the Internet, %* ..... 7.0 ..... 122		
1.09 GATS commitment restrictiveness (0–100)* ..... 44.7 ..... 98			9.04 Fixed telephone lines/100 pop.* ..... 7.4 ..... 100		
			9.05 Broadband Internet subscribers/100 pop.* ..... 0.8 ..... 104		
<b>2nd pillar: Environmental sustainability ..... 4.7 ..... 55</b>			9.06 Mobile telephone subscriptions/100 pop.* ..... 142.8 ..... <b>19</b>		
2.01 Stringency of environmental regulation ..... 4.6 ..... <b>48</b>			9.07 Mobile broadband subscriptions/100 pop.* ..... 11.8 ..... 71		
2.02 Enforcement of environmental regulation ..... 4.5 ..... <b>35</b>					
2.03 Sustainability of T&T industry development ..... 5.2 ..... <b>20</b>			<b>10th pillar: Price competitiveness in T&amp;T ind. .... 5.2 ..... 12</b>		
2.04 Carbon dioxide emission, million tons/capita* ..... 2.5 ..... 60			10.01 Ticket taxes and airport charges (0–100)* ..... 94.9 ..... <b>7</b>		
2.05 Particulate matter concentration, µg/m <sup>3</sup> * ..... 66.2 ..... 119			10.02 Purchasing power parity* ..... 0.6 ..... 55		
2.06 Threatened species, %* ..... 2.3 ..... <b>13</b>			10.04 Fuel price, US\$ cents/liter* ..... 97.0 ..... 52		
2.07 Environm. treaty ratification (0–25)* ..... 15 ..... 123			10.03 Extent and effect of taxation ..... 4.7 ..... <b>13</b>		
			10.05 Hotel price index, US\$* ..... 124.0 ..... <b>49</b>		
<b>3rd pillar: Safety and security ..... 4.7 ..... 75</b>					
3.01 Business costs of crime and violence ..... 5.1 ..... 57			<b>11th pillar: Human resources ..... 3.6 ..... 128</b>		
3.02 Reliability of police services ..... 5.0 ..... <b>43</b>			<i>Education and training</i> ..... 4.6 ..... 78		
3.03 Road traffic accidents/100,000 pop.* ..... 33.8 ..... 124			11.01 Primary education enrollment, net %* ..... 89.7 ..... 96		
3.04 Business costs of terrorism ..... 6.5 ..... <b>7</b>			11.02 Secondary education enrollment, gross %* ..... 81.7 ..... 87		
			11.03 Quality of the educational system ..... 4.0 ..... 55		
<b>4th pillar: Health and hygiene ..... 3.7 ..... 97</b>			11.04 Local availability specialized research & training... 3.7 ..... 94		
4.01 Physician density/1,000 pop.* ..... 0.3 ..... 107			11.05 Extent of staff training ..... 3.9 ..... 67		
4.02 Access to improved sanitation, % pop.* ..... 62.0 ..... 100			<i>Availability of qualified labor</i> ..... 2.6 ..... 138		
4.03 Access to improved drinking water, % pop.* ..... 96.0 ..... 63			11.06 Hiring and firing practices ..... 3.1 ..... 119		
4.04 Hospital beds/10,000 pop.* ..... 18.0 ..... 87			11.07 Ease of hiring foreign labor ..... 3.3 ..... 125		
			11.08 HIV prevalence, % adult pop.* ..... 24.8 ..... 139		
<b>5th pillar: Prioritization of Travel &amp; Tourism ..... 4.4 ..... 72</b>			11.09 Business impact of HIV/AIDS ..... 3.0 ..... 132		
5.01 Government prioritization of the T&T industry ..... 5.8 ..... <b>38</b>			11.10 Life expectancy, years* ..... 53.0 ..... 128		
5.02 T&T gov't expenditure, % gov't budget* ..... 6.2 ..... <b>24</b>					
5.03 Effectiveness of marketing to attract tourists ..... 4.8 ..... 52			<b>12th pillar: Affinity for Travel &amp; Tourism ..... 4.3 ..... 105</b>		
5.04 Comprehensiveness of T&T data (0–120)* ..... 44.0 ..... 111			12.01 Tourism openness, % of GDP* ..... 1.6 ..... 124		
5.05 Timeliness of T&T data (0–18)* ..... 0.0 ..... 126			12.02 Attitude of population toward foreign visitors ..... 5.9 ..... 103		
			12.03 Extension of business trips recommended ..... 5.6 ..... 52		
<b>6th pillar: Air transport infrastructure ..... 2.7 ..... 89</b>			12.04 Degree of customer orientation ..... 4.2 ..... 104		
6.01 Quality of air transport infrastructure ..... 4.1 ..... 96					
6.02 Airline seat kms/week, dom., millions* ..... 1.5 ..... 72			<b>13th pillar: Natural resources ..... 4.3 ..... 39</b>		
6.03 Airline seat kms/week, int'l, millions* ..... 3.9 ..... 137			13.01 No. of World Heritage natural sites* ..... 0 ..... 79		
6.04 Departures/1,000 pop.* ..... 3.8 ..... 65			13.02 Quality of the natural environment ..... 5.4 ..... <b>27</b>		
6.05 Airport density/million pop.* ..... 2.0 ..... <b>23</b>			13.03 Total known species* ..... 728 ..... <b>49</b>		
6.06 No. of operating airlines* ..... 5.5 ..... 129			13.04 Terrestrial biome protection (0–17%)* ..... 17.0 ..... <b>1</b>		
6.07 International air transport network ..... 3.8 ..... 113			13.05 Marine protected areas, %* ..... n/a ..... n/a		
<b>7th pillar: Ground transport infrastructure ..... 3.2 ..... 83</b>			<b>14th pillar: Cultural resources ..... 1.6 ..... 109</b>		
7.01 Quality of roads ..... 4.4 ..... 55			14.01 No. of World Heritage cultural sites* ..... 1 ..... 109		
7.02 Quality of railroad infrastructure ..... 3.1 ..... 55			14.02 Sports stadiums, seats/million pop.* ..... 41,610.5 ..... 64		
7.03 Quality of port infrastructure ..... 3.7 ..... 96			14.03 No. of int'l fairs and exhibitions* ..... 5.7 ..... 89		
7.04 Quality of ground transport network ..... 4.0 ..... 104			14.04 Creative industries exports, % of world total* ..... 0.0 ..... 96		
7.05 Road density/million pop.* ..... 4.0 ..... 130					

# Brazil

## Key indicators

Population (millions), 2011 .....	199.7
Surface area (1,000 square kilometers), 2011 .....	8,514.9
Gross domestic product (current US\$ billions), 2011 .....	2,492.9
Gross domestic product (current PPP, \$) per capita, 2011 .....	11,769.1
Real GDP growth (percent), 2011 .....	2.7
Environmental Performance Index 2012, rank (out of 132 economies), 2011 .....	30

## Travel & Tourism indicators

### T&T industry, 2012 estimates

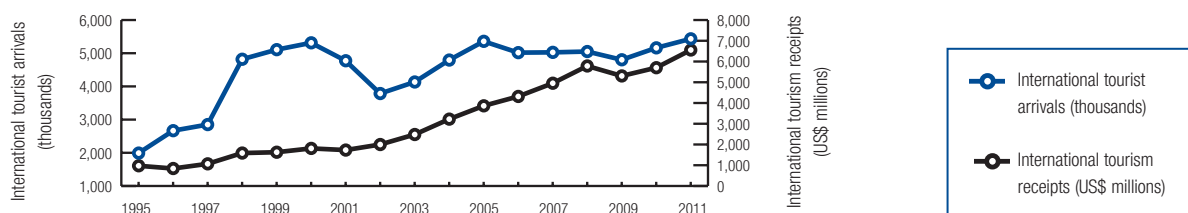
	Absolute value	Percent of total	T&T industry GDP growth forecast (2013–2022)
T&T industry GDP (US\$ millions).....	84,594.3	3.3	5.0
T&T industry employment (1,000 jobs) .....	2,875.1	2.9	2.5

### T&T economy, 2012 estimates

T&T economy GDP (US\$ millions) .....	226,010	8.9	5.1
T&T economy employment (1,000 jobs) .....	8,045	8.1	2.3

International tourist arrivals (thousands), 2011 .....5,433.4

International tourism receipts (US\$, millions), 2011 .....6,554.9



## The Travel & Tourism Competitiveness Index

	Rank (out of 140)	Score (1–7)
2013 Travel & Tourism Competitiveness Index.....	51	4.4
2011 Travel & Tourism Competitiveness Index.....	52	4.4
2009 Travel & Tourism Competitiveness Index.....	45	4.3

### T&T regulatory framework .....82 .....4.4

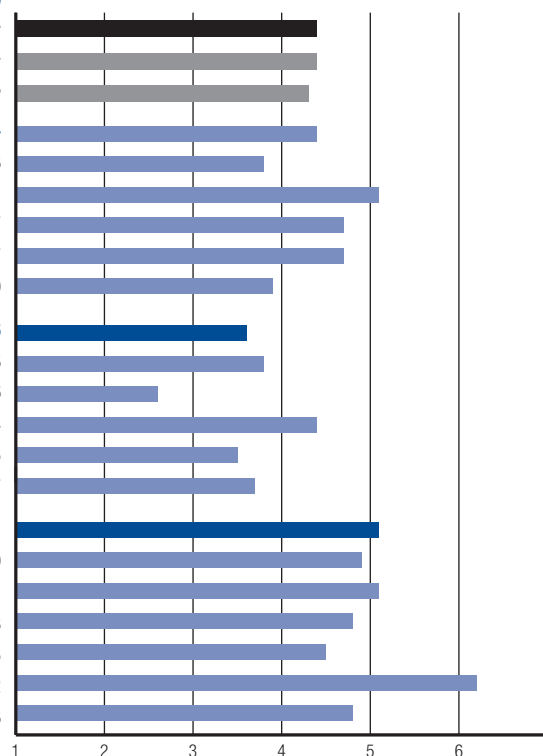
Policy rules and regulations .....	119	3.8
Environmental sustainability .....	30	5.1
Safety and security.....	73	4.7
Health and hygiene.....	70	4.7
Prioritization of Travel & Tourism .....	102	3.9

### Business environment and infrastructure .....76 .....3.6

Air transport infrastructure .....	48	3.8
Ground transport infrastructure.....	129	2.6
Tourism infrastructure .....	60	4.4
ICT infrastructure .....	55	3.5
Price competitiveness in the T&T industry .....	126	3.7

### T&T human, cultural, and natural resources.....12 .....5.1

Human resources .....	62	4.9
Education and training.....	39	5.1
Availability of qualified labor.....	96	4.8
Affinity for Travel & Tourism .....	83	4.5
Natural resources .....	1	6.2
Cultural resources.....	23	4.8



**Note:** For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" on page 83.



## The Travel &amp; Tourism Competitiveness Index in detail

INDICATOR	SCORE	RANK	INDICATOR	SCORE	RANK
<b>1st pillar: Policy rules and regulations ..... 3.8 ..... 119</b>			<b>8th pillar: Tourism infrastructure ..... 4.4 ..... 60</b>		
1.01 Prevalence of foreign ownership ..... 4.5 ..... 81			8.01 Hotel rooms/100 pop.* ..... 0.5 ..... 60		
1.02 Property rights ..... 4.7 ..... 50			8.02 Presence of major car rental co. (1–7)* ..... 6 ..... 32		
1.03 Business impact of rules on FDI ..... 4.6 ..... 75			8.03 ATMs accepting Visa cards/million pop.* ..... 380.1 ..... 53		
1.04 Visa requirements, no. of countries* ..... 65.0 ..... 94					
1.05 Openness bilateral ASAs (0–38)* ..... 14.4 ..... 32			<b>9th pillar: ICT infrastructure ..... 3.5 ..... 55</b>		
1.06 Transparency of government policymaking ..... 4.0 ..... 89			9.01 ICT use for B-to-B transactions ..... 5.5 ..... 40		
1.07 No. of days to start a business* ..... 119 ..... 138			9.02 ICT use for B-to-C transactions ..... 5.3 ..... 28		
1.08 Cost to start a business, % GNI/capita* ..... 4.8 ..... 50			9.03 Individuals using the Internet, %* ..... 45.0 ..... 62		
1.09 GATS commitment restrictiveness (0–100)* ..... 16.5 ..... 116			9.04 Fixed telephone lines/100 pop.* ..... 21.9 ..... 54		
			9.05 Broadband Internet subscribers/100 pop.* ..... 8.6 ..... 63		
<b>2nd pillar: Environmental sustainability ..... 5.1 ..... 30</b>			9.06 Mobile telephone subscriptions/100 pop.* ..... 124.3 ..... 39		
2.01 Stringency of environmental regulation ..... 5.2 ..... 27			9.07 Mobile broadband subscriptions/100 pop.* ..... 20.9 ..... 53		
2.02 Enforcement of environmental regulation ..... 4.1 ..... 49					
2.03 Sustainability of T&T industry development ..... 3.9 ..... 93			<b>10th pillar: Price competitiveness in T&amp;T ind. .... 3.7 ..... 126</b>		
2.04 Carbon dioxide emission, million tons/capita* ..... 2.1 ..... 58			10.01 Ticket taxes and airport charges (0–100)* ..... 60.1 ..... 118		
2.05 Particulate matter concentration, µg/m <sup>3</sup> * ..... 19.5 ..... 34			10.02 Purchasing power parity* ..... 1.1 ..... 118		
2.06 Threatened species, %* ..... 8.3 ..... 108			10.04 Fuel price, US\$ cents/liter* ..... 114.0 ..... 77		
2.07 Environm. treaty ratification (0–25)* ..... 22 ..... 20			10.03 Extent and effect of taxation ..... 2.1 ..... 140		
			10.05 Hotel price index, US\$* ..... 138.0 ..... 72		
<b>3rd pillar: Safety and security ..... 4.7 ..... 73</b>					
3.01 Business costs of crime and violence ..... 3.5 ..... 118			<b>11th pillar: Human resources ..... 4.9 ..... 62</b>		
3.02 Reliability of police services ..... 4.4 ..... 60			<i>Education and training</i> ..... 5.1 ..... 39		
3.03 Road traffic accidents/100,000 pop.* ..... 18.3 ..... 79			11.01 Primary education enrollment, net %* ..... 94.4 ..... 60		
3.04 Business costs of terrorism ..... 6.4 ..... 11			11.02 Secondary education enrollment, gross %* ..... 105.8 ..... 16		
			11.03 Quality of the educational system ..... 3.0 ..... 115		
<b>4th pillar: Health and hygiene ..... 4.7 ..... 70</b>			11.04 Local availability specialized research & training ..... 4.8 ..... 34		
4.01 Physician density/1,000 pop.* ..... 1.8 ..... 68			11.05 Extent of staff training ..... 4.4 ..... 33		
4.02 Access to improved sanitation, % pop.* ..... 79.0 ..... 84			<i>Availability of qualified labor</i> ..... 4.8 ..... 96		
4.03 Access to improved drinking water, % pop.* ..... 98.0 ..... 52			11.06 Hiring and firing practices ..... 3.3 ..... 111		
4.04 Hospital beds/10,000 pop.* ..... 24.0 ..... 73			11.07 Ease of hiring foreign labor ..... 3.6 ..... 109		
			11.08 HIV prevalence, % adult pop.* ..... 0.6 ..... 90		
<b>5th pillar: Prioritization of Travel &amp; Tourism ..... 3.9 ..... 102</b>			11.09 Business impact of HIV/AIDS ..... 5.2 ..... 73		
5.01 Government prioritization of the T&T industry ..... 4.8 ..... 100			11.10 Life expectancy, years* ..... 73.4 ..... 73		
5.02 T&T gov't expenditure, % gov't budget* ..... 2.8 ..... 83					
5.03 Effectiveness of marketing to attract tourists ..... 3.9 ..... 102			<b>12th pillar: Affinity for Travel &amp; Tourism ..... 4.5 ..... 83</b>		
5.04 Comprehensiveness of T&T data (0–120)* ..... 43.0 ..... 113			12.01 Tourism openness, % of GDP* ..... 1.1 ..... 133		
5.05 Timeliness of T&T data (0–18)* ..... 13.5 ..... 71			12.02 Attitude of population toward foreign visitors ..... 6.4 ..... 43		
			12.03 Extension of business trips recommended ..... 5.5 ..... 55		
<b>6th pillar: Air transport infrastructure ..... 3.8 ..... 48</b>			12.04 Degree of customer orientation ..... 4.8 ..... 49		
6.01 Quality of air transport infrastructure ..... 3.0 ..... 131					
6.02 Airline seat kms/week, dom., millions* ..... 2,293.6 ..... 3			<b>13th pillar: Natural resources ..... 6.2 ..... 1</b>		
6.03 Airline seat kms/week, int'l, millions* ..... 1,267.3 ..... 19			13.01 No. of World Heritage natural sites* ..... 7 ..... 6		
6.04 Departures/1,000 pop.* ..... 4.5 ..... 59			13.02 Quality of the natural environment ..... 5.1 ..... 38		
6.05 Airport density/million pop.* ..... 0.5 ..... 81			13.03 Total known species* ..... 3,188 ..... 1		
6.06 No. of operating airlines* ..... 54.0 ..... 30			13.04 Terrestrial biome protection (0–17%)* ..... 14.1 ..... 47		
6.07 International air transport network ..... 4.6 ..... 74			13.05 Marine protected areas, %* ..... 1.3 ..... 36		
<b>7th pillar: Ground transport infrastructure ..... 2.6 ..... 129</b>			<b>14th pillar: Cultural resources ..... 4.8 ..... 23</b>		
7.01 Quality of roads ..... 2.7 ..... 121			14.01 No. of World Heritage cultural sites* ..... 17 ..... 16		
7.02 Quality of railroad infrastructure ..... 1.8 ..... 98			14.02 Sports stadiums, seats/million pop.* ..... 42,319.1 ..... 63		
7.03 Quality of port infrastructure ..... 2.6 ..... 132			14.03 No. of int'l fairs and exhibitions* ..... 295.7 ..... 8		
7.04 Quality of ground transport network ..... 4.0 ..... 99			14.04 Creative industries exports, % of world total* ..... 0.2 ..... 41		
7.05 Road density/million pop.* ..... 21.0 ..... 84					

# Brunei Darussalam

## Key indicators

Population (millions), 2011 .....	0.4
Surface area (1,000 square kilometers), 2011 .....	5.8
Gross domestic product (current US\$ billions), 2011 .....	16.4
Gross domestic product (current PPP, \$) per capita, 2011 .....	49,536.1
Real GDP growth (percent), 2011 .....	2.2
Environmental Performance Index 2012, rank (out of 132 economies), 2011 .....	26

## Travel & Tourism indicators

### T&T industry, 2012 estimates

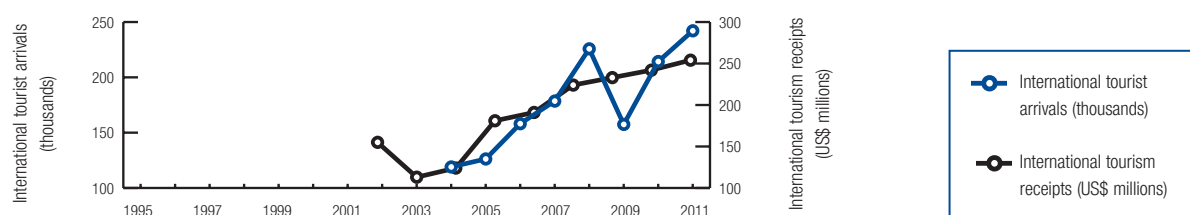
	Absolute value	Percent of total	T&T industry GDP growth forecast (2013–2022)
T&T industry GDP (US\$ millions).....	282.1	2.0	2.1
T&T industry employment (1,000 jobs) .....	5.7	2.9	0.7

### T&T economy, 2012 estimates

T&T economy GDP (US\$ millions) .....	932	6.6	1.9
T&T economy employment (1,000 jobs) .....	15	7.5	0.6

International tourist arrivals (thousands), 2011 .....242.1

International tourism receipts (US\$, millions), 2009.....254.0



## The Travel & Tourism Competitiveness Index

	Rank (out of 140)	Score (1–7)
<b>2013 Travel &amp; Tourism Competitiveness Index.....</b>	<b>72</b>	<b>4.0</b>
2011 Travel & Tourism Competitiveness Index.....	67	4.1
2009 Travel & Tourism Competitiveness Index.....	69	4.0

### T&T regulatory framework .....94 .....4.2

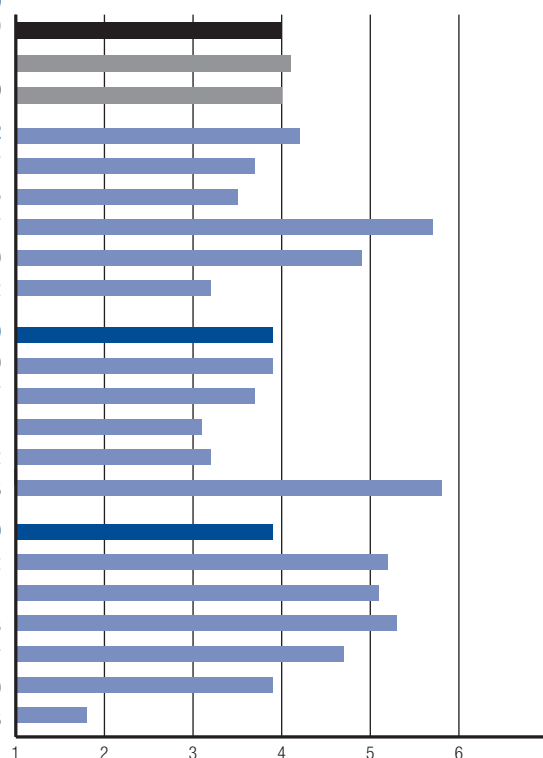
Policy rules and regulations .....	126	3.7
Environmental sustainability .....	135	3.5
Safety and security.....	24	5.7
Health and hygiene.....	65	4.9
Prioritization of Travel & Tourism .....	123	3.2

### Business environment and infrastructure .....57 .....3.9

Air transport infrastructure .....	45	3.9
Ground transport infrastructure.....	67	3.7
Tourism infrastructure .....	86	3.1
ICT infrastructure .....	65	3.2
Price competitiveness in the T&T industry .....	2	5.8

### T&T human, cultural, and natural resources.....67 .....3.9

Human resources .....	36	5.2
Education and training.....	38	5.1
Availability of qualified labor.....	28	5.3
Affinity for Travel & Tourism .....	63	4.7
Natural resources .....	53	3.9
Cultural resources.....	95	1.8



**Note:** For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" on page 83.

# Brunei Darussalam

## The Travel & Tourism Competitiveness Index in detail

INDICATOR	SCORE	RANK
<b>1st pillar: Policy rules and regulations</b> ..... 3.7 ..... 126		
1.01 Prevalence of foreign ownership ..... 4.6 ..... 74		
1.02 Property rights ..... 4.6 ..... 55		
1.03 Business impact of rules on FDI ..... 4.8 ..... 51		
1.04 Visa requirements, no. of countries* ..... 55.5 ..... 104		
1.05 Openness bilateral ASAs (0–38)* ..... 17.6 ..... 20		
1.06 Transparency of government policymaking ..... 4.2 ..... 73		
1.07 No. of days to start a business* ..... 101 ..... 136		
1.08 Cost to start a business, % GNI/capita* ..... 10.7 ..... 76		
1.09 GATS commitment restrictiveness (0–100)* ..... 0.0 ..... 117		
<b>2nd pillar: Environmental sustainability</b> ..... 3.5 ..... 135		
2.01 Stringency of environmental regulation ..... 4.7 ..... 44		
2.02 Enforcement of environmental regulation ..... 4.5 ..... 33		
2.03 Sustainability of T&T industry development ..... 4.8 ..... 51		
2.04 Carbon dioxide emission, million tons/capita* ..... 27.5 ..... 136		
2.05 Particulate matter concentration, µg/m <sup>3</sup> * ..... 48.1 ..... 99		
2.06 Threatened species, %* ..... 10.1 ..... 117		
2.07 Environm. treaty ratification (0–25)* ..... 12 ..... 135		
<b>3rd pillar: Safety and security</b> ..... 5.7 ..... 24		
3.01 Business costs of crime and violence ..... 6.0 ..... 11		
3.02 Reliability of police services ..... 5.1 ..... 35		
3.03 Road traffic accidents/100,000 pop.* ..... 13.8 ..... 54		
3.04 Business costs of terrorism ..... 6.3 ..... 17		
<b>4th pillar: Health and hygiene</b> ..... 4.9 ..... 65		
4.01 Physician density/1,000 pop.* ..... 1.4 ..... 77		
4.02 Access to improved sanitation, % pop.* ..... 90.0 ..... 67		
4.03 Access to improved drinking water, % pop.* ..... 99.9 ..... 41		
4.04 Hospital beds/10,000 pop.* ..... 26.0 ..... 69		
<b>5th pillar: Prioritization of Travel &amp; Tourism</b> ..... 3.2 ..... 123		
5.01 Government prioritization of the T&T industry ..... 5.1 ..... 80		
5.02 T&T gov't expenditure, % gov't budget* ..... 0.7 ..... 134		
5.03 Effectiveness of marketing to attract tourists ..... 4.5 ..... 65		
5.04 Comprehensiveness of T&T data (0–120)* ..... 22.0 ..... 134		
5.05 Timeliness of T&T data (0–18)* ..... 3.0 ..... 112		
<b>6th pillar: Air transport infrastructure</b> ..... 3.9 ..... 45		
6.01 Quality of air transport infrastructure ..... 4.9 ..... 61		
6.02 Airline seat kms/week, dom., millions* ..... 0.0 ..... 105		
6.03 Airline seat kms/week, int'l, millions* ..... 68.6 ..... 85		
6.04 Departures/1,000 pop.* ..... 26.7 ..... 15		
6.05 Airport density/million pop.* ..... 2.5 ..... 19		
6.06 No. of operating airlines* ..... 6.0 ..... 125		
6.07 International air transport network ..... 4.7 ..... 65		
<b>7th pillar: Ground transport infrastructure</b> ..... 3.7 ..... 67		
7.01 Quality of roads ..... 5.2 ..... 30		
7.02 Quality of railroad infrastructure ..... 2.1 ..... 86		
7.03 Quality of port infrastructure ..... 4.5 ..... 57		
7.04 Quality of ground transport network ..... 3.6 ..... 124		
7.05 Road density/million pop.* ..... 51.0 ..... 53		

INDICATOR	SCORE	RANK
<b>8th pillar: Tourism infrastructure</b> ..... 3.1 ..... 86		
8.01 Hotel rooms/100 pop.* ..... 0.9 ..... 34		
8.02 Presence of major car rental co. (1–7)* ..... 2 ..... 111		
8.03 ATMs accepting Visa cards/million pop.* ..... 152.7 ..... 90		
<b>9th pillar: ICT infrastructure</b> ..... 3.2 ..... 65		
9.01 ICT use for B-to-B transactions ..... 5.2 ..... 55		
9.02 ICT use for B-to-C transactions ..... 4.7 ..... 61		
9.03 Individuals using the Internet, %* ..... 56.0 ..... 47		
9.04 Fixed telephone lines/100 pop.* ..... 19.7 ..... 66		
9.05 Broadband Internet subscribers/100 pop.* ..... 5.7 ..... 72		
9.06 Mobile telephone subscriptions/100 pop.* ..... 109.2 ..... 60		
9.07 Mobile broadband subscriptions/100 pop.* ..... 6.3 ..... 83		
<b>10th pillar: Price competitiveness in T&amp;T ind.</b> ..... 5.8 ..... 2		
10.01 Ticket taxes and airport charges (0–100)* ..... 94.3 ..... 8		
10.02 Purchasing power parity* ..... 0.6 ..... 62		
10.04 Fuel price, US\$ cents/liter* ..... 24.0 ..... 9		
10.03 Extent and effect of taxation ..... 4.7 ..... 15		
10.05 Hotel price index, US\$* ..... n/a ..... n/a		
<b>11th pillar: Human resources</b> ..... 5.2 ..... 36		
<i>Education and training</i> ..... 5.1 ..... 38		
11.01 Primary education enrollment, net %* ..... 92.9 ..... 75		
11.02 Secondary education enrollment, gross %* ..... 109.7 ..... 11		
11.03 Quality of the educational system ..... 4.7 ..... 25		
11.04 Local availability specialized research & training ..... 3.5 ..... 108		
11.05 Extent of staff training ..... 4.1 ..... 52		
<i>Availability of qualified labor</i> ..... 5.3 ..... 28		
11.06 Hiring and firing practices ..... 4.5 ..... 37		
11.07 Ease of hiring foreign labor ..... 3.7 ..... 101		
11.08 HIV prevalence, % adult pop.* ..... 0.0 ..... 1		
11.09 Business impact of HIV/AIDS ..... 5.2 ..... 76		
11.10 Life expectancy, years* ..... 78.1 ..... 36		
<b>12th pillar: Affinity for Travel &amp; Tourism</b> ..... 4.7 ..... 63		
12.01 Tourism openness, % of GDP* ..... 6.8 ..... 37		
12.02 Attitude of population toward foreign visitors ..... 6.2 ..... 76		
12.03 Extension of business trips recommended ..... 4.7 ..... 110		
12.04 Degree of customer orientation ..... 4.9 ..... 44		
<b>13th pillar: Natural resources</b> ..... 3.9 ..... 53		
13.01 No. of World Heritage natural sites* ..... 0 ..... 79		
13.02 Quality of the natural environment ..... 5.6 ..... 19		
13.03 Total known species* ..... 602 ..... 62		
13.04 Terrestrial biome protection (0–17%)* ..... 17.0 ..... 1		
13.05 Marine protected areas, %* ..... 1.4 ..... 33		
<b>14th pillar: Cultural resources</b> ..... 1.8 ..... 95		
14.01 No. of World Heritage cultural sites* ..... 0 ..... 125		
14.02 Sports stadiums, seats/million pop.* ..... 73,902.9 ..... 32		
14.03 No. of int'l fairs and exhibitions* ..... 4.7 ..... 96		
14.04 Creative industries exports, % of world total* ..... 0.0 ..... 132		

# Bulgaria

## Key indicators

Population (millions), 2011 .....	7.7
Surface area (1,000 square kilometers), 2011 .....	111.0
Gross domestic product (current US\$ billions), 2011 .....	53.5
Gross domestic product (current PPP, \$) per capita, 2011 .....	13,789.0
Real GDP growth (percent), 2011 .....	1.7
Environmental Performance Index 2012, rank (out of 132 economies), 2011 .....	53

## Travel & Tourism indicators

### T&T industry, 2012 estimates

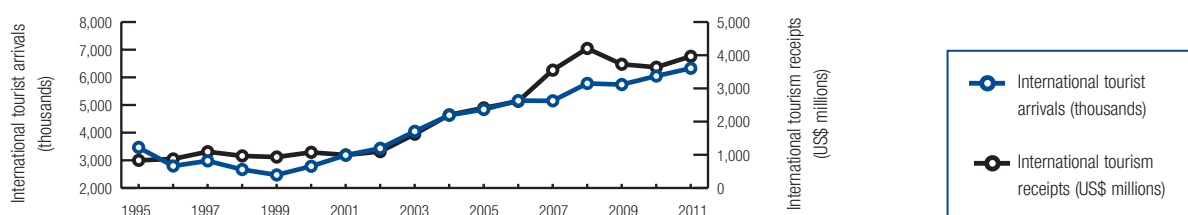
	Absolute value	Percent of total	T&T industry GDP growth forecast (2013–2022)
T&T industry GDP (US\$ millions) .....	1,939.0	3.5	2.6
T&T industry employment (1,000 jobs) .....	97.4	3.2	-2.0

### T&T economy, 2012 estimates

T&T economy GDP (US\$ millions) .....	6,900	12.4	2.5
T&T economy employment (1,000 jobs) .....	347	11.3	-2.2

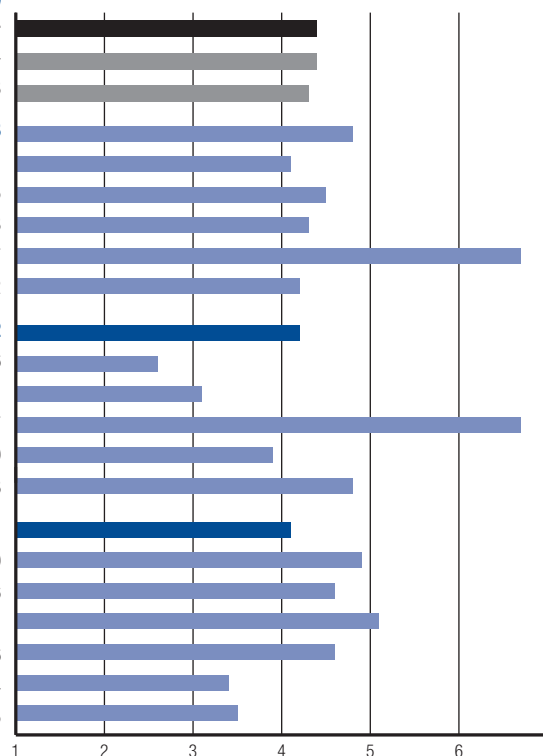
International tourist arrivals (thousands), 2011 ..... 6,328.0

International tourism receipts (US\$, millions), 2011 ..... 3,966.6



## The Travel & Tourism Competitiveness Index

	Rank (out of 140)	Score (1–7)
<b>2013 Travel &amp; Tourism Competitiveness Index .....</b>	<b>50</b>	<b>4.4</b>
2011 Travel & Tourism Competitiveness Index .....	48	4.4
2009 Travel & Tourism Competitiveness Index .....	50	4.3
<b>T&amp;T regulatory framework .....</b>	<b>58</b>	<b>4.8</b>
Policy rules and regulations .....	102	4.1
Environmental sustainability .....	76	4.5
Safety and security .....	89	4.3
Health and hygiene .....	5	6.7
Prioritization of Travel & Tourism .....	82	4.2
<b>Business environment and infrastructure .....</b>	<b>45</b>	<b>4.2</b>
Air transport infrastructure .....	91	2.6
Ground transport infrastructure .....	91	3.1
Tourism infrastructure .....	4	6.7
ICT infrastructure .....	42	3.9
Price competitiveness in the T&T industry .....	49	4.8
<b>T&amp;T human, cultural, and natural resources .....</b>	<b>53</b>	<b>4.1</b>
Human resources .....	69	4.9
Education and training .....	73	4.6
Availability of qualified labor .....	54	5.1
Affinity for Travel & Tourism .....	67	4.6
Natural resources .....	76	3.4
Cultural resources .....	40	3.5



**Note:** For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" on page 83.

# Bulgaria

## The Travel & Tourism Competitiveness Index in detail

INDICATOR	SCORE	RANK
<b>1st pillar: Policy rules and regulations</b> ..... 4.1 ..... 102		
1.01 Prevalence of foreign ownership ..... 4.1 ..... 105		
1.02 Property rights ..... 3.5 ..... 112		
1.03 Business impact of rules on FDI ..... 3.6 ..... 120		
1.04 Visa requirements, no. of countries* ..... 71.0 ..... 58		
1.05 Openness bilateral ASAs (0–38)* ..... 7.3 ..... 111		
1.06 Transparency of government policymaking ..... 3.6 ..... 124		
1.07 No. of days to start a business* ..... 18 ..... 76		
1.08 Cost to start a business, % GNI/capita* ..... 1.1 ..... 17		
1.09 GATS commitment restrictiveness (0–100)* ..... 48.5 ..... 88		
<b>2nd pillar: Environmental sustainability</b> ..... 4.5 ..... 76		
2.01 Stringency of environmental regulation ..... 3.4 ..... 98		
2.02 Enforcement of environmental regulation ..... 3.2 ..... 93		
2.03 Sustainability of T&T industry development ..... 3.8 ..... 100		
2.04 Carbon dioxide emission, million tons/capita* ..... 6.6 ..... 94		
2.05 Particulate matter concentration, µg/m <sup>3</sup> * ..... 44.6 ..... 96		
2.06 Threatened species, %* ..... 4.7 ..... 65		
2.07 Environm. treaty ratification (0–25)* ..... 23 ..... 13		
<b>3rd pillar: Safety and security</b> ..... 4.3 ..... 89		
3.01 Business costs of crime and violence ..... 3.8 ..... 107		
3.02 Reliability of police services ..... 3.4 ..... 108		
3.03 Road traffic accidents/100,000 pop.* ..... 13.2 ..... 47		
3.04 Business costs of terrorism ..... 4.8 ..... 109		
<b>4th pillar: Health and hygiene</b> ..... 6.7 ..... 5		
4.01 Physician density/1,000 pop.* ..... 3.7 ..... 14		
4.02 Access to improved sanitation, % pop.* ..... 100.0 ..... 1		
4.03 Access to improved drinking water, % pop.* ..... 100.0 ..... 1		
4.04 Hospital beds/10,000 pop.* ..... 66.0 ..... 15		
<b>5th pillar: Prioritization of Travel &amp; Tourism</b> ..... 4.2 ..... 82		
5.01 Government prioritization of the T&T industry ..... 4.5 ..... 111		
5.02 T&T gov't expenditure, % gov't budget* ..... 3.2 ..... 67		
5.03 Effectiveness of marketing to attract tourists ..... 3.8 ..... 103		
5.04 Comprehensiveness of T&T data (0–120)* ..... 77.0 ..... 34		
5.05 Timeliness of T&T data (0–18)* ..... 17.5 ..... 7		
<b>6th pillar: Air transport infrastructure</b> ..... 2.6 ..... 91		
6.01 Quality of air transport infrastructure ..... 4.0 ..... 100		
6.02 Airline seat kms/week, dom., millions* ..... 2.3 ..... 66		
6.03 Airline seat kms/week, int'l, millions* ..... 90.3 ..... 79		
6.04 Departures/1,000 pop.* ..... 4.1 ..... 62		
6.05 Airport density/million pop.* ..... 0.4 ..... 91		
6.06 No. of operating airlines* ..... 37.0 ..... 48		
6.07 International air transport network ..... 4.1 ..... 105		
<b>7th pillar: Ground transport infrastructure</b> ..... 3.1 ..... 91		
7.01 Quality of roads ..... 2.5 ..... 127		
7.02 Quality of railroad infrastructure ..... 3.0 ..... 56		
7.03 Quality of port infrastructure ..... 3.7 ..... 99		
7.04 Quality of ground transport network ..... 4.2 ..... 89		
7.05 Road density/million pop.* ..... 36.0 ..... 65		

INDICATOR	SCORE	RANK
<b>8th pillar: Tourism infrastructure</b> ..... 6.7 ..... 4		
8.01 Hotel rooms/100 pop.* ..... 1.5 ..... 19		
8.02 Presence of major car rental co. (1–7)* ..... 7 ..... 1		
8.03 ATMs accepting Visa cards/million pop.* ..... 691.5 ..... 18		
<b>9th pillar: ICT infrastructure</b> ..... 3.9 ..... 42		
9.01 ICT use for B-to-B transactions ..... 4.6 ..... 96		
9.02 ICT use for B-to-C transactions ..... 4.6 ..... 64		
9.03 Individuals using the Internet, %* ..... 51.0 ..... 54		
9.04 Fixed telephone lines/100 pop.* ..... 31.6 ..... 37		
9.05 Broadband Internet subscribers/100 pop.* ..... 16.4 ..... 38		
9.06 Mobile telephone subscriptions/100 pop.* ..... 140.7 ..... 21		
9.07 Mobile broadband subscriptions/100 pop.* ..... 29.9 ..... 42		
<b>10th pillar: Price competitiveness in T&amp;T ind.</b> ..... 4.8 ..... 49		
10.01 Ticket taxes and airport charges (0–100)* ..... 87.4 ..... 32		
10.02 Purchasing power parity* ..... 0.5 ..... 28		
10.04 Fuel price, US\$ cents/liter* ..... 158.0 ..... 117		
10.03 Extent and effect of taxation ..... 3.4 ..... 76		
10.05 Hotel price index, US\$* ..... 85.6 ..... 14		
<b>11th pillar: Human resources</b> ..... 4.9 ..... 69		
<i>Education and training</i> ..... 4.6 ..... 73		
11.01 Primary education enrollment, net %* ..... 98.0 ..... 28		
11.02 Secondary education enrollment, gross %* ..... 88.9 ..... 69		
11.03 Quality of the educational system ..... 3.2 ..... 97		
11.04 Local availability specialized research & training ..... 3.8 ..... 89		
11.05 Extent of staff training ..... 3.3 ..... 116		
<i>Availability of qualified labor</i> ..... 5.1 ..... 54		
11.06 Hiring and firing practices ..... 4.2 ..... 49		
11.07 Ease of hiring foreign labor ..... 4.0 ..... 87		
11.08 HIV prevalence, % adult pop.* ..... 0.1 ..... 12		
11.09 Business impact of HIV/AIDS ..... 5.5 ..... 63		
11.10 Life expectancy, years* ..... 73.5 ..... 69		
<b>12th pillar: Affinity for Travel &amp; Tourism</b> ..... 4.6 ..... 67		
12.01 Tourism openness, % of GDP* ..... 9.9 ..... 22		
12.02 Attitude of population toward foreign visitors ..... 5.5 ..... 132		
12.03 Extension of business trips recommended ..... 4.7 ..... 109		
12.04 Degree of customer orientation ..... 4.6 ..... 69		
<b>13th pillar: Natural resources</b> ..... 3.4 ..... 76		
13.01 No. of World Heritage natural sites* ..... 2 ..... 25		
13.02 Quality of the natural environment ..... 3.4 ..... 121		
13.03 Total known species* ..... 448 ..... 83		
13.04 Terrestrial biome protection (0–17%)* ..... 9.1 ..... 82		
13.05 Marine protected areas, %* ..... 0.6 ..... 58		
<b>14th pillar: Cultural resources</b> ..... 3.5 ..... 40		
14.01 No. of World Heritage cultural sites* ..... 9 ..... 29		
14.02 Sports stadiums, seats/million pop.* ..... 102,149.8 ..... 22		
14.03 No. of int'l fairs and exhibitions* ..... 23.0 ..... 65		
14.04 Creative industries exports, % of world total* ..... 0.1 ..... 56		

# Burkina Faso

## Key indicators

Population (millions), 2011 .....	17.0
Surface area (1,000 square kilometers), 2011 .....	274.2
Gross domestic product (current US\$ billions), 2011 .....	10.2
Gross domestic product (current PPP, \$) per capita, 2011 .....	1,302.3
Real GDP growth (percent), 2011 .....	4.2
Environmental Performance Index 2012, rank (out of 132 economies), 2011 .....	n/a

## Travel & Tourism indicators

### T&T industry, 2012 estimates

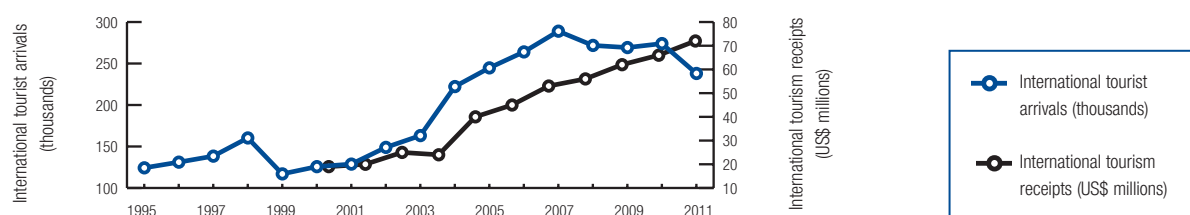
	Absolute value	Percent of total	T&T industry GDP growth forecast (2013–2022)
T&T industry GDP (US\$ millions).....	148.3	1.5	3.5
T&T industry employment (1,000 jobs) .....	55.1	1.2	0.1

### T&T economy, 2012 estimates

T&T economy GDP (US\$ millions) .....	342	3.4	4.1
T&T economy employment (1,000 jobs) .....	132	3.0	0.7

International tourist arrivals (thousands), 2011 .....238.0

International tourism receipts (US\$, millions), 2010.....72.0



## The Travel & Tourism Competitiveness Index

2013 Travel & Tourism Competitiveness Index ..... **128** ..... **3.1**

2011 Travel & Tourism Competitiveness Index ..... 132 ..... 3.1

2009 Travel & Tourism Competitiveness Index ..... 126 ..... 3.1

**T&T regulatory framework** ..... **120** ..... **3.6**

Policy rules and regulations ..... 107 ..... 4.0

Environmental sustainability ..... 80 ..... 4.4

Safety and security ..... 107 ..... 4.0

Health and hygiene ..... 126 ..... 2.0

Prioritization of Travel & Tourism ..... 106 ..... 3.7

**Business environment and infrastructure** ..... **134** ..... **2.6**

Air transport infrastructure ..... 129 ..... 2.0

Ground transport infrastructure ..... 112 ..... 2.8

Tourism infrastructure ..... 120 ..... 1.9

ICT infrastructure ..... 130 ..... 1.7

Price competitiveness in the T&T industry ..... 86 ..... 4.4

**T&T human, cultural, and natural resources** ..... **129** ..... **3.2**

Human resources ..... 129 ..... 3.5

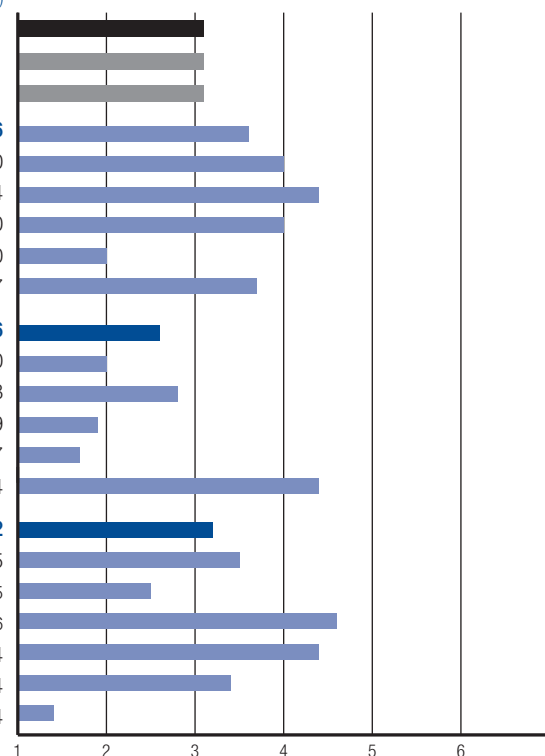
Education and training ..... 138 ..... 2.5

Availability of qualified labor ..... 114 ..... 4.6

Affinity for Travel & Tourism ..... 94 ..... 4.4

Natural resources ..... 81 ..... 3.4

Cultural resources ..... 126 ..... 1.4



**Note:** For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" on page 83.

# Burkina Faso

## The Travel & Tourism Competitiveness Index in detail

INDICATOR	SCORE	RANK	INDICATOR	SCORE	RANK
<b>1st pillar: Policy rules and regulations</b> ..... 4.0 ..... 107			<b>8th pillar: Tourism infrastructure</b> ..... 1.9 ..... 120		
1.01 Prevalence of foreign ownership ..... 4.1 ..... 103			8.01 Hotel rooms/100 pop.* ..... 0.0 ..... 129		
1.02 Property rights ..... 4.3 ..... 64			8.02 Presence of major car rental co. (1–7)* ..... 3 ..... 97		
1.03 Business impact of rules on FDI ..... 4.8 ..... 47			8.03 ATMs accepting Visa cards/million pop.* ..... 4.2 ..... 130		
1.04 Visa requirements, no. of countries* ..... 41.2 ..... 111					
1.05 Openness bilateral ASAs (0–38)* ..... 2.2 ..... 137			<b>9th pillar: ICT infrastructure</b> ..... 1.7 ..... 130		
1.06 Transparency of government policymaking ..... 4.4 ..... 58			9.01 ICT use for B-to-B transactions ..... 4.3 ..... 114		
1.07 No. of days to start a business* ..... 13 ..... 61			9.02 ICT use for B-to-C transactions ..... 3.6 ..... 117		
1.08 Cost to start a business, % GNI/capita* ..... 46.8 ..... 116			9.03 Individuals using the Internet, %* ..... 3.0 ..... 132		
1.09 GATS commitment restrictiveness (0–100)* ..... 62.3 ..... 55			9.04 Fixed telephone lines/100 pop.* ..... 0.8 ..... 126		
			9.05 Broadband Internet subscribers/100 pop.* ..... 0.1 ..... 122		
<b>2nd pillar: Environmental sustainability</b> ..... 4.4 ..... 80			9.06 Mobile telephone subscriptions/100 pop.* ..... 45.3 ..... 129		
2.01 Stringency of environmental regulation ..... 3.2 ..... 106			9.07 Mobile broadband subscriptions/100 pop.* ..... 0.0 ..... 128		
2.02 Enforcement of environmental regulation ..... 3.2 ..... 94					
2.03 Sustainability of T&T industry development ..... 4.4 ..... 69			<b>10th pillar: Price competitiveness in T&amp;T ind.</b> ..... 4.4 ..... 86		
2.04 Carbon dioxide emission, million tons/capita* ..... 0.1 ..... 10			10.01 Ticket taxes and airport charges (0–100)* ..... 59.8 ..... 119		
2.05 Particulate matter concentration, µg/m <sup>3</sup> * ..... 62.6 ..... 117			10.02 Purchasing power parity* ..... 0.5 ..... 23		
2.06 Threatened species, %* ..... 3.0 ..... 32			10.04 Fuel price, US\$ cents/liter* ..... 128.0 ..... 89		
2.07 Environm. treaty ratification (0–25)* ..... 17 ..... 96			10.03 Extent and effect of taxation ..... 3.3 ..... 87		
			10.05 Hotel price index, US\$* ..... n/a ..... n/a		
<b>3rd pillar: Safety and security</b> ..... 4.0 ..... 107					
3.01 Business costs of crime and violence ..... 4.3 ..... 92			<b>11th pillar: Human resources</b> ..... 3.5 ..... 129		
3.02 Reliability of police services ..... 3.8 ..... 93			<i>Education and training</i> ..... 2.5 ..... 138		
3.03 Road traffic accidents/100,000 pop.* ..... 31.1 ..... 116			11.01 Primary education enrollment, net %* ..... 63.2 ..... 133		
3.04 Business costs of terrorism ..... 5.4 ..... 83			11.02 Secondary education enrollment, gross %* ..... 22.6 ..... 139		
			11.03 Quality of the educational system ..... 2.8 ..... 123		
<b>4th pillar: Health and hygiene</b> ..... 2.0 ..... 126			11.04 Local availability specialized research & training ..... 3.7 ..... 92		
4.01 Physician density/1,000 pop.* ..... 0.1 ..... 126			11.05 Extent of staff training ..... 2.9 ..... 134		
4.02 Access to improved sanitation, % pop.* ..... 17.0 ..... 131			<i>Availability of qualified labor</i> ..... 4.6 ..... 114		
4.03 Access to improved drinking water, % pop.* ..... 79.0 ..... 115			11.06 Hiring and firing practices ..... 4.5 ..... 32		
4.04 Hospital beds/10,000 pop.* ..... 4.0 ..... 132			11.07 Ease of hiring foreign labor ..... 4.7 ..... 20		
			11.08 HIV prevalence, % adult pop.* ..... 1.2 ..... 108		
<b>5th pillar: Prioritization of Travel &amp; Tourism</b> ..... 3.7 ..... 106			11.09 Business impact of HIV/AIDS ..... 4.5 ..... 107		
5.01 Government prioritization of the T&T industry ..... 5.4 ..... 58			11.10 Life expectancy, years* ..... 55.4 ..... 124		
5.02 T&T gov't expenditure, % gov't budget* ..... 1.9 ..... 110					
5.03 Effectiveness of marketing to attract tourists ..... 4.5 ..... 64			<b>12th pillar: Affinity for Travel &amp; Tourism</b> ..... 4.4 ..... 94		
5.04 Comprehensiveness of T&T data (0–120)* ..... 57.0 ..... 89			12.01 Tourism openness, % of GDP* ..... 1.6 ..... 125		
5.05 Timeliness of T&T data (0–18)* ..... 3.0 ..... 112			12.02 Attitude of population toward foreign visitors ..... 6.6 ..... 10		
			12.03 Extension of business trips recommended ..... 5.5 ..... 57		
<b>6th pillar: Air transport infrastructure</b> ..... 2.0 ..... 129			12.04 Degree of customer orientation ..... 4.0 ..... 113		
6.01 Quality of air transport infrastructure ..... 3.3 ..... 125					
6.02 Airline seat kms/week, dom., millions* ..... 0.1 ..... 102			<b>13th pillar: Natural resources</b> ..... 3.4 ..... 81		
6.03 Airline seat kms/week, int'l, millions* ..... 12.4 ..... 126			13.01 No. of World Heritage natural sites* ..... 0 ..... 79		
6.04 Departures/1,000 pop.* ..... 0.3 ..... 119			13.02 Quality of the natural environment ..... 3.4 ..... 122		
6.05 Airport density/million pop.* ..... 0.1 ..... 128			13.03 Total known species* ..... 597 ..... 64		
6.06 No. of operating airlines* ..... 9.0 ..... 116			13.04 Terrestrial biome protection (0–17%)* ..... 14.3 ..... 45		
6.07 International air transport network ..... 3.9 ..... 110			13.05 Marine protected areas, %* ..... n/a ..... n/a		
<b>7th pillar: Ground transport infrastructure</b> ..... 2.8 ..... 112			<b>14th pillar: Cultural resources</b> ..... 1.4 ..... 126		
7.01 Quality of roads ..... 2.6 ..... 123			14.01 No. of World Heritage cultural sites* ..... 2 ..... 88		
7.02 Quality of railroad infrastructure ..... 2.0 ..... 90			14.02 Sports stadiums, seats/million pop.* ..... 8,133.0 ..... 115		
7.03 Quality of port infrastructure ..... 3.6 ..... 102			14.03 No. of int'l fairs and exhibitions* ..... 4.3 ..... 102		
7.04 Quality of ground transport network ..... 3.8 ..... 113			14.04 Creative industries exports, % of world total* ..... 0.0 ..... 119		
7.05 Road density/million pop.* ..... 34.0 ..... 68					



# Burundi

## Key indicators

Population (millions), 2011 .....	8.6
Surface area (1,000 square kilometers), 2011 .....	27.8
Gross domestic product (current US\$ billions), 2011 .....	2.4
Gross domestic product (current PPP, \$) per capita, 2011 .....	605.0
Real GDP growth (percent), 2011 .....	4.2
Environmental Performance Index 2012, rank (out of 132 economies), 2011 .....	n/a

## Travel & Tourism indicators

### T&T industry, 2012 estimates

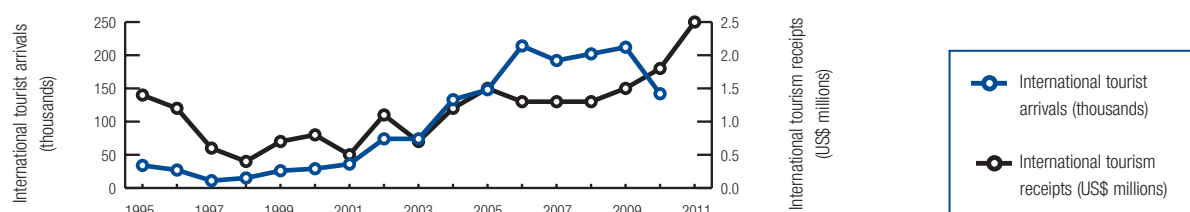
	Absolute value	Percent of total	T&T industry GDP growth forecast (2013–2022)
T&T industry GDP (US\$ millions) .....	59.0	3.3	0.9
T&T industry employment (1,000 jobs) .....	52.1	2.8	–1.6

### T&T economy, 2012 estimates

T&T economy GDP (US\$ millions) .....	126	7.1	1.3
T&T economy employment (1,000 jobs) .....	116	6.2	–1.3

International tourist arrivals (thousands), 2010 .....

International tourism receipts (US\$, millions), 2011 .....



## The Travel & Tourism Competitiveness Index

	Rank (out of 140)	Score (1–7)
<b>2013 Travel &amp; Tourism Competitiveness Index .....</b>	<b>138</b>	<b>2.8</b>
2011 Travel & Tourism Competitiveness Index .....	137	2.8
2009 Travel & Tourism Competitiveness Index .....	131	3.0
<b>T&amp;T regulatory framework .....</b>	<b>130</b>	<b>3.4</b>
Policy rules and regulations .....	91	4.3
Environmental sustainability .....	102	4.2
Safety and security .....	133	3.3
Health and hygiene .....	117	2.6
Prioritization of Travel & Tourism .....	138	2.5
<b>Business environment and infrastructure .....</b>	<b>139</b>	<b>2.3</b>
Air transport infrastructure .....	138	1.8
Ground transport infrastructure .....	107	2.9
Tourism infrastructure .....	137	1.3
ICT infrastructure .....	139	1.4
Price competitiveness in the T&T industry .....	88	4.3
<b>T&amp;T human, cultural, and natural resources .....</b>	<b>138</b>	<b>2.7</b>
Human resources .....	137	3.2
Education and training .....	135	2.7
Availability of qualified labor .....	131	3.7
Affinity for Travel & Tourism .....	126	4.1
Natural resources .....	127	2.6
Cultural resources .....	140	1.0

**Note:** For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" on page 83.

## Burundi

## The Travel &amp; Tourism Competitiveness Index in detail

INDICATOR	SCORE	RANK	INDICATOR	SCORE	RANK
<b>1st pillar: Policy rules and regulations ..... 4.3 ..... 91</b>			<b>8th pillar: Tourism infrastructure ..... 1.3 ..... 137</b>		
1.01 Prevalence of foreign ownership ..... 2.8 ..... 138			8.01 Hotel rooms/100 pop.* ..... 0.0 ..... 140		
1.02 Property rights ..... 2.4 ..... 137			8.02 Presence of major car rental co. (1–7)* ..... 1 ..... 123		
1.03 Business impact of rules on FDI ..... 3.3 ..... 129			8.03 ATMs accepting Visa cards/million pop.* ..... 0.7 ..... 138		
1.04 Visa requirements, no. of countries* ..... 127.9 ..... 24					
1.05 Openness bilateral ASAs (0–38)* ..... 10.0 ..... 81			<b>9th pillar: ICT infrastructure ..... 1.4 ..... 139</b>		
1.06 Transparency of government policymaking ..... 3.3 ..... 130			9.01 ICT use for B-to-B transactions ..... 3.3 ..... 134		
1.07 No. of days to start a business* ..... 8 ..... 33			9.02 ICT use for B-to-C transactions ..... 2.7 ..... 133		
1.08 Cost to start a business, % GNI/capita* ..... 18.3 ..... 95			9.03 Individuals using the Internet, %* ..... 1.1 ..... 138		
1.09 GATS commitment restrictiveness (0–100)* ..... 87.5 ..... 3			9.04 Fixed telephone lines/100 pop.* ..... 0.3 ..... 136		
			9.05 Broadband Internet subscribers/100 pop.* ..... 0.0 ..... 137		
<b>2nd pillar: Environmental sustainability ..... 4.2 ..... 102</b>			9.06 Mobile telephone subscriptions/100 pop.* ..... 22.3 ..... 139		
2.01 Stringency of environmental regulation ..... 2.4 ..... 133			9.07 Mobile broadband subscriptions/100 pop.* ..... 0.0 ..... 128		
2.02 Enforcement of environmental regulation ..... 2.2 ..... 133					
2.03 Sustainability of T&T industry development ..... 3.2 ..... 127			<b>10th pillar: Price competitiveness in T&amp;T ind. .... 4.3 ..... 88</b>		
2.04 Carbon dioxide emission, million tons/capita* ..... 0.0 ..... 1			10.01 Ticket taxes and airport charges (0–100)* ..... 83.4 ..... 49		
2.05 Particulate matter concentration, µg/m <sup>3</sup> * ..... 28.2 ..... 59			10.02 Purchasing power parity* ..... 0.4 ..... 20		
2.06 Threatened species, %* ..... 3.9 ..... 50			10.04 Fuel price, US\$ cents/liter* ..... 142.0 ..... 99		
2.07 Environm. treaty ratification (0–25)* ..... 16 ..... 112			10.03 Extent and effect of taxation ..... 2.2 ..... 139		
			10.05 Hotel price index, US\$* ..... n/a ..... n/a		
<b>3rd pillar: Safety and security ..... 3.3 ..... 133</b>					
3.01 Business costs of crime and violence ..... 3.6 ..... 112			<b>11th pillar: Human resources ..... 3.2 ..... 137</b>		
3.02 Reliability of police services ..... 2.0 ..... 140			<i>Education and training</i> ..... 2.7 ..... 135		
3.03 Road traffic accidents/100,000 pop.* ..... 23.4 ..... 95			11.01 Primary education enrollment, net %* ..... 89.7 ..... 95		
3.04 Business costs of terrorism ..... 4.0 ..... 130			11.02 Secondary education enrollment, gross %* ..... 24.8 ..... 136		
			11.03 Quality of the educational system ..... 2.0 ..... 139		
<b>4th pillar: Health and hygiene ..... 2.6 ..... 117</b>			11.04 Local availability specialized research & training ..... 2.2 ..... 140		
4.01 Physician density/1,000 pop.* ..... 0.0 ..... 134			11.05 Extent of staff training ..... 2.4 ..... 139		
4.02 Access to improved sanitation, % pop.* ..... 46.0 ..... 114			<i>Availability of qualified labor</i> ..... 3.7 ..... 131		
4.03 Access to improved drinking water, % pop.* ..... 72.0 ..... 120			11.06 Hiring and firing practices ..... 3.7 ..... 84		
4.04 Hospital beds/10,000 pop.* ..... 19.0 ..... 84			11.07 Ease of hiring foreign labor ..... 3.5 ..... 114		
			11.08 HIV prevalence, % adult pop.* ..... 3.3 ..... 124		
<b>5th pillar: Prioritization of Travel &amp; Tourism ..... 2.5 ..... 138</b>			11.09 Business impact of HIV/AIDS ..... 2.7 ..... 137		
5.01 Government prioritization of the T&T industry ..... 4.1 ..... 122			11.10 Life expectancy, years* ..... 50.3 ..... 134		
5.02 T&T gov't expenditure, % gov't budget* ..... 0.7 ..... 133					
5.03 Effectiveness of marketing to attract tourists ..... 3.2 ..... 129			<b>12th pillar: Affinity for Travel &amp; Tourism ..... 4.1 ..... 126</b>		
5.04 Comprehensiveness of T&T data (0–120)* ..... 28.0 ..... 130			12.01 Tourism openness, % of GDP* ..... 1.4 ..... 128		
5.05 Timeliness of T&T data (0–18)* ..... 0.0 ..... 126			12.02 Attitude of population toward foreign visitors ..... 6.3 ..... 63		
			12.03 Extension of business trips recommended ..... 5.1 ..... 89		
<b>6th pillar: Air transport infrastructure ..... 1.8 ..... 138</b>			12.04 Degree of customer orientation ..... 3.6 ..... 133		
6.01 Quality of air transport infrastructure ..... 2.8 ..... 135					
6.02 Airline seat kms/week, dom., millions* ..... 0.0 ..... 105			<b>13th pillar: Natural resources ..... 2.6 ..... 127</b>		
6.03 Airline seat kms/week, int'l, millions* ..... 2.2 ..... 138			13.01 No. of World Heritage natural sites* ..... 0 ..... 79		
6.04 Departures/1,000 pop.* ..... 0.2 ..... 120			13.02 Quality of the natural environment ..... 2.7 ..... 134		
6.05 Airport density/million pop.* ..... 0.1 ..... 129			13.03 Total known species* ..... 753 ..... 48		
6.06 No. of operating airlines* ..... 3.0 ..... 137			13.04 Terrestrial biome protection (0–17%)* ..... 5.2 ..... 102		
6.07 International air transport network ..... 3.6 ..... 120			13.05 Marine protected areas, %* ..... n/a ..... n/a		
<b>7th pillar: Ground transport infrastructure ..... 2.9 ..... 107</b>			<b>14th pillar: Cultural resources ..... 1.0 ..... 140</b>		
7.01 Quality of roads ..... 2.7 ..... 119			14.01 No. of World Heritage cultural sites* ..... 0 ..... 125		
7.02 Quality of railroad infrastructure ..... n/a ..... n/a			14.02 Sports stadiums, seats/million pop.* ..... 2,565.5 ..... 134		
7.03 Quality of port infrastructure ..... 2.6 ..... 133			14.03 No. of int'l fairs and exhibitions* ..... 0.3 ..... 131		
7.04 Quality of ground transport network ..... 3.6 ..... 123			14.04 Creative industries exports, % of world total* ..... 0.0 ..... 130		
7.05 Road density/million pop.* ..... 44.0 ..... 69					

# Cambodia

## Key indicators

Population (millions), 2011 .....	14.4
Surface area (1,000 square kilometers), 2011 .....	181.0
Gross domestic product (current US\$ billions), 2011 .....	12.9
Gross domestic product (current PPP, \$) per capita, 2011 .....	2,239.2
Real GDP growth (percent), 2011 .....	7.1
Environmental Performance Index 2012, rank (out of 132 economies), 2011 .....	59

## Travel & Tourism indicators

### T&T industry, 2012 estimates

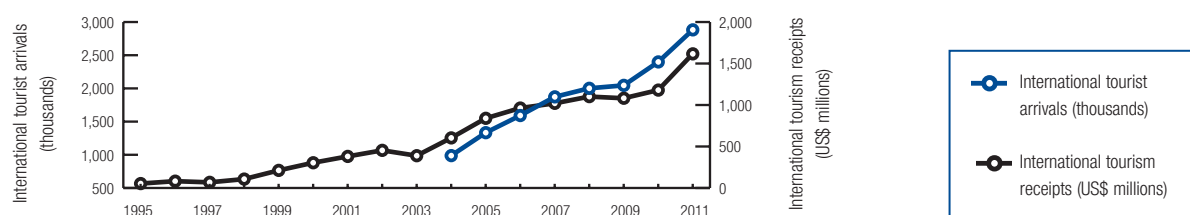
	Absolute value	Percent of total	T&T industry GDP growth forecast (2013–2022)
T&T industry GDP (US\$ millions) .....	1,239.2	9.6	6.0
T&T industry employment (1,000 jobs) .....	622.7	8.1	3.0

### T&T economy, 2012 estimates

T&T economy GDP (US\$ millions) .....	2,913	22.5	6.3
T&T economy employment (1,000 jobs) .....	1,503	19.5	2.6

International tourist arrivals (thousands), 2011 ..... 2,881.9

International tourism receipts (US\$, millions), 2011 ..... 1,616.4



## The Travel & Tourism Competitiveness Index

	Rank (out of 140)	Score (1–7)
2013 Travel & Tourism Competitiveness Index .....	106	3.6

2011 Travel & Tourism Competitiveness Index .....	109	3.4
2009 Travel & Tourism Competitiveness Index .....	108	3.4

### T&T regulatory framework ..... 105 ..... 4.1

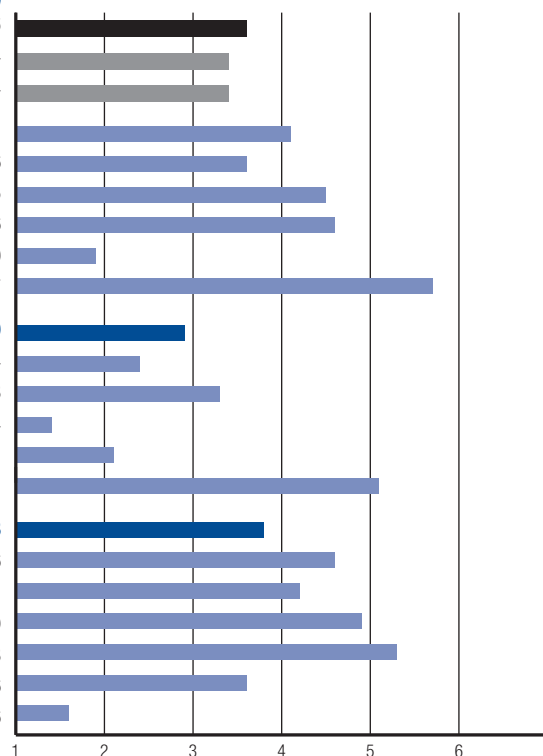
Policy rules and regulations .....	128	3.6
Environmental sustainability .....	75	4.5
Safety and security .....	78	4.6
Health and hygiene .....	129	1.9
Prioritization of Travel & Tourism .....	13	5.7

### Business environment and infrastructure ..... 112 ..... 2.9

Air transport infrastructure .....	106	2.4
Ground transport infrastructure .....	81	3.3
Tourism infrastructure .....	132	1.4
ICT infrastructure .....	112	2.1
Price competitiveness in the T&T industry .....	19	5.1

### T&T human, cultural, and natural resources ..... 78 ..... 3.8

Human resources .....	99	4.6
Education and training .....	100	4.2
Availability of qualified labor .....	90	4.9
Affinity for Travel & Tourism .....	20	5.3
Natural resources .....	67	3.6
Cultural resources .....	111	1.6



**Note:** For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" on page 83.

# Cambodia

## The Travel & Tourism Competitiveness Index in detail

INDICATOR	SCORE	RANK	INDICATOR	SCORE	RANK
<b>1st pillar: Policy rules and regulations</b> ..... 3.6..... 128			<b>8th pillar: Tourism infrastructure</b> ..... 1.4..... 132		
1.01 Prevalence of foreign ownership ..... 4.4..... 92			8.01 Hotel rooms/100 pop.* ..... 0.3..... 80		
1.02 Property rights ..... 3.8..... 93			8.02 Presence of major car rental co. (1–7)* ..... 0..... 136		
1.03 Business impact of rules on FDI ..... 5.0..... 38			8.03 ATMs accepting Visa cards/million pop.* ..... 34.7..... 112		
1.04 Visa requirements, no. of countries* ..... 102.1..... 30					
1.05 Openness bilateral ASAs (0–38)* ..... 8.5..... 101			<b>9th pillar: ICT infrastructure</b> ..... 2.1..... 112		
1.06 Transparency of government policymaking ..... 4.0..... 92			9.01 ICT use for B-to-B transactions ..... 4.7..... 87		
1.07 No. of days to start a business* ..... 85..... 134			9.02 ICT use for B-to-C transactions ..... 4.1..... 94		
1.08 Cost to start a business, % GNI/capita* ..... 100.5..... 131			9.03 Individuals using the Internet, %* ..... 3.1..... 131		
1.09 GATS commitment restrictiveness (0–100)* ..... 69.1..... 41			9.04 Fixed telephone lines/100 pop.* ..... 3.7..... 110		
			9.05 Broadband Internet subscribers/100 pop.* ..... 0.2..... 118		
<b>2nd pillar: Environmental sustainability</b> ..... 4.5..... 75			9.06 Mobile telephone subscriptions/100 pop.* ..... 96.2..... 90		
2.01 Stringency of environmental regulation ..... 3.7..... 82			9.07 Mobile broadband subscriptions/100 pop.* ..... 2.2..... 101		
2.02 Enforcement of environmental regulation ..... 3.7..... 64					
2.03 Sustainability of T&T industry development ..... 4.9..... 42			<b>10th pillar: Price competitiveness in T&amp;T ind.</b> ..... 5.1..... 19		
2.04 Carbon dioxide emission, million tons/capita* ..... 0.3..... 21			10.01 Ticket taxes and airport charges (0–100)* ..... 82.7..... 54		
2.05 Particulate matter concentration, µg/m <sup>3</sup> * ..... 37.0..... 89			10.02 Purchasing power parity* ..... 0.4..... 5		
2.06 Threatened species, %* ..... 9.1..... 115			10.04 Fuel price, US\$ cents/liter* ..... 98.0..... 55		
2.07 Environm. treaty ratification (0–25)* ..... 17..... 96			10.03 Extent and effect of taxation ..... 4.0..... 33		
			10.05 Hotel price index, US\$* ..... 120.6..... 47		
<b>3rd pillar: Safety and security</b> ..... 4.6..... 78					
3.01 Business costs of crime and violence ..... 4.4..... 89			<b>11th pillar: Human resources</b> ..... 4.6..... 99		
3.02 Reliability of police services ..... 3.5..... 102			<i>Education and training</i> ..... 4.2..... 100		
3.03 Road traffic accidents/100,000 pop.* ..... 12.1..... 35			11.01 Primary education enrollment, net %* ..... 95.9..... 45		
3.04 Business costs of terrorism ..... 5.0..... 103			11.02 Secondary education enrollment, gross %* ..... 46.2..... 115		
			11.03 Quality of the educational system ..... 3.9..... 57		
<b>4th pillar: Health and hygiene</b> ..... 1.9..... 129			11.04 Local availability specialized research & training... 4.0..... 78		
4.01 Physician density/1,000 pop.* ..... 0.2..... 113			11.05 Extent of staff training ..... 3.9..... 73		
4.02 Access to improved sanitation, % pop.* ..... 31.0..... 120			<i>Availability of qualified labor</i> ..... 4.9..... 90		
4.03 Access to improved drinking water, % pop.* ..... 64.0..... 126			11.06 Hiring and firing practices ..... 4.4..... 39		
4.04 Hospital beds/10,000 pop.* ..... 8.4..... 118			11.07 Ease of hiring foreign labor ..... 4.7..... 27		
			11.08 HIV prevalence, % adult pop.* ..... 0.5..... 85		
<b>5th pillar: Prioritization of Travel &amp; Tourism</b> ..... 5.7..... 13			11.09 Business impact of HIV/AIDS ..... 4.7..... 96		
5.01 Government prioritization of the T&T industry ..... 5.8..... 44			11.10 Life expectancy, years* ..... 63.0..... 112		
5.02 T&T gov't expenditure, % gov't budget* ..... 9.4..... 12					
5.03 Effectiveness of marketing to attract tourists ..... 5.0..... 43			<b>12th pillar: Affinity for Travel &amp; Tourism</b> ..... 5.3..... 20		
5.04 Comprehensiveness of T&T data (0–120)* ..... 64.0..... 72			12.01 Tourism openness, % of GDP* ..... 14.5..... 15		
5.05 Timeliness of T&T data (0–18)* ..... 16.5..... 17			12.02 Attitude of population toward foreign visitors ..... 6.0..... 100		
			12.03 Extension of business trips recommended ..... 5.3..... 75		
<b>6th pillar: Air transport infrastructure</b> ..... 2.4..... 106			12.04 Degree of customer orientation ..... 4.9..... 43		
6.01 Quality of air transport infrastructure ..... 4.4..... 75					
6.02 Airline seat kms/week, dom., millions* ..... 1.0..... 75			<b>13th pillar: Natural resources</b> ..... 3.6..... 67		
6.03 Airline seat kms/week, int'l, millions* ..... 56.7..... 89			13.01 No. of World Heritage natural sites* ..... 0..... 79		
6.04 Departures/1,000 pop.* ..... 0.4..... 115			13.02 Quality of the natural environment ..... 4.4..... 67		
6.05 Airport density/million pop.* ..... 0.3..... 112			13.03 Total known species* ..... 722..... 51		
6.06 No. of operating airlines* ..... 19.0..... 84			13.04 Terrestrial biome protection (0–17%)* ..... 17.0..... 1		
6.07 International air transport network ..... 4.3..... 86			13.05 Marine protected areas, %* ..... 0.2..... 77		
<b>7th pillar: Ground transport infrastructure</b> ..... 3.3..... 81			<b>14th pillar: Cultural resources</b> ..... 1.6..... 111		
7.01 Quality of roads ..... 4.0..... 66			14.01 No. of World Heritage cultural sites* ..... 4..... 63		
7.02 Quality of railroad infrastructure ..... 2.3..... 79			14.02 Sports stadiums, seats/million pop.* ..... 3,635.0..... 129		
7.03 Quality of port infrastructure ..... 4.2..... 69			14.03 No. of int'l fairs and exhibitions* ..... 4.3..... 102		
7.04 Quality of ground transport network ..... 4.0..... 98			14.04 Creative industries exports, % of world total* ..... 0.0..... 84		
7.05 Road density/million pop.* ..... 21.0..... 84					

# Cameroon

## Key indicators

Population (millions), 2011 .....	20.1
Surface area (1,000 square kilometers), 2011 .....	475.4
Gross domestic product (current US\$ billions), 2011 .....	25.6
Gross domestic product (current PPP, \$) per capita, 2011 .....	2,259.3
Real GDP growth (percent), 2011 .....	4.2
Environmental Performance Index 2012, rank (out of 132 economies), 2011 .....	112

## Travel & Tourism indicators

### T&T industry, 2012 estimates

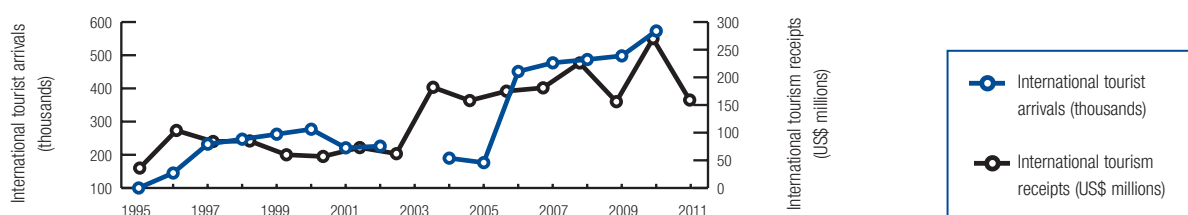
	Absolute value	Percent of total	T&T industry GDP growth forecast (2013–2022)
T&T industry GDP (US\$ millions).....	633.2	2.5	5.2
T&T industry employment (1,000 jobs) .....	97.6	2.1	2.7

### T&T economy, 2012 estimates

T&T economy GDP (US\$ millions) .....	1,411	5.5	5.2
T&T economy employment (1,000 jobs) .....	224	4.8	2.6

International tourist arrivals (thousands), 2010.....573.0

International tourism receipts (US\$, millions), 2010.....159.0



## The Travel & Tourism Competitiveness Index

	Rank (out of 140)	Score (1–7)	
<b>2013 Travel &amp; Tourism Competitiveness Index.....</b>	<b>121</b>	<b>3.3</b>	
2011 Travel & Tourism Competitiveness Index.....	126	3.2	
2009 Travel & Tourism Competitiveness Index.....	125	3.1	
<b>T&amp;T regulatory framework .....</b>	<b>123</b>	<b>3.6</b>	
Policy rules and regulations .....	111	4.0	
Environmental sustainability .....	108	4.2	
Safety and security.....	102	4.1	
Health and hygiene.....	116	2.7	
Prioritization of Travel & Tourism .....	132	3.0	
<b>Business environment and infrastructure .....</b>	<b>124</b>	<b>2.7</b>	
Air transport infrastructure .....	117	2.2	
Ground transport infrastructure.....	111	2.8	
Tourism infrastructure .....	114	2.1	
ICT infrastructure .....	123	1.9	
Price competitiveness in the T&T industry .....	85	4.4	
<b>T&amp;T human, cultural, and natural resources.....</b>	<b>102</b>	<b>3.6</b>	
Human resources .....	112	4.2	
Education and training.....	108	4.0	
Availability of qualified labor.....	121	4.4	
Affinity for Travel & Tourism .....	103	4.3	
Natural resources .....	32	4.5	
Cultural resources.....	136	1.1	

**Note:** For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" on page 83.

# Cameroon

## The Travel & Tourism Competitiveness Index in detail

INDICATOR	SCORE	RANK
<b>1st pillar: Policy rules and regulations</b> ..... 4.0..... 111		
1.01 Prevalence of foreign ownership ..... 5.4..... 29		
1.02 Property rights ..... 3.8..... 95		
1.03 Business impact of rules on FDI ..... 4.8..... 52		
1.04 Visa requirements, no. of countries* ..... 5.0..... 137		
1.05 Openness bilateral ASAs (0–38)* ..... 10.0..... 78		
1.06 Transparency of government policymaking ..... 4.2..... 71		
1.07 No. of days to start a business* ..... 15..... 68		
1.08 Cost to start a business, % GNI/capita* ..... 35.8..... 112		
1.09 GATS commitment restrictiveness (0–100)* ..... 36.4..... 106		
<b>2nd pillar: Environmental sustainability</b> ..... 4.2..... 108		
2.01 Stringency of environmental regulation ..... 3.0..... 120		
2.02 Enforcement of environmental regulation ..... 3.0..... 103		
2.03 Sustainability of T&T industry development ..... 3.4..... 116		
2.04 Carbon dioxide emission, million tons/capita* ..... 0.3..... 19		
2.05 Particulate matter concentration, µg/m <sup>3</sup> * ..... 57.6..... 109		
2.06 Threatened species, %* ..... 8.4..... 109		
2.07 Environm. treaty ratification (0–25)* ..... 21..... 39		
<b>3rd pillar: Safety and security</b> ..... 4.1..... 102		
3.01 Business costs of crime and violence ..... 4.3..... 97		
3.02 Reliability of police services ..... 3.9..... 86		
3.03 Road traffic accidents/100,000 pop.* ..... 28.1..... 107		
3.04 Business costs of terrorism ..... 5.2..... 91		
<b>4th pillar: Health and hygiene</b> ..... 2.7..... 116		
4.01 Physician density/1,000 pop.* ..... 0.2..... 115		
4.02 Access to improved sanitation, % pop.* ..... 49.0..... 111		
4.03 Access to improved drinking water, % pop.* ..... 77.0..... 117		
4.04 Hospital beds/10,000 pop.* ..... 13.0..... 103		
<b>5th pillar: Prioritization of Travel &amp; Tourism</b> ..... 3.0..... 132		
5.01 Government prioritization of the T&T industry ..... 4.4..... 115		
5.02 T&T gov't expenditure, % gov't budget* ..... 1.8..... 113		
5.03 Effectiveness of marketing to attract tourists ..... 3.6..... 112		
5.04 Comprehensiveness of T&T data (0–120)* ..... 37.0..... 120		
5.05 Timeliness of T&T data (0–18)* ..... 0.0..... 126		
<b>6th pillar: Air transport infrastructure</b> ..... 2.2..... 117		
6.01 Quality of air transport infrastructure ..... 3.7..... 107		
6.02 Airline seat kms/week, dom., millions* ..... 1.3..... 73		
6.03 Airline seat kms/week, int'l, millions* ..... 42.1..... 97		
6.04 Departures/1,000 pop.* ..... 0.5..... 109		
6.05 Airport density/million pop.* ..... 0.2..... 118		
6.06 No. of operating airlines* ..... 17.0..... 88		
6.07 International air transport network ..... 4.3..... 87		
<b>7th pillar: Ground transport infrastructure</b> ..... 2.8..... 111		
7.01 Quality of roads ..... 2.9..... 110		
7.02 Quality of railroad infrastructure ..... 2.5..... 73		
7.03 Quality of port infrastructure ..... 3.7..... 98		
7.04 Quality of ground transport network ..... 4.0..... 97		
7.05 Road density/million pop.* ..... 6.0..... 125		

INDICATOR	SCORE	RANK
<b>8th pillar: Tourism infrastructure</b> ..... 2.1..... 114		
8.01 Hotel rooms/100 pop.* ..... 0.2..... 90		
8.02 Presence of major car rental co. (1–7)* ..... 3..... 97		
8.03 ATMs accepting Visa cards/million pop.* ..... 7.7..... 126		
<b>9th pillar: ICT infrastructure</b> ..... 1.9..... 123		
9.01 ICT use for B-to-B transactions ..... 5.2..... 53		
9.02 ICT use for B-to-C transactions ..... 3.9..... 101		
9.03 Individuals using the Internet, %* ..... 5.0..... 124		
9.04 Fixed telephone lines/100 pop.* ..... 3.3..... 111		
9.05 Broadband Internet subscribers/100 pop.* ..... 0.0..... 135		
9.06 Mobile telephone subscriptions/100 pop.* ..... 52.4..... 126		
9.07 Mobile broadband subscriptions/100 pop.* ..... 0.0..... 128		
<b>10th pillar: Price competitiveness in T&amp;T ind.</b> ..... 4.4..... 85		
10.01 Ticket taxes and airport charges (0–100)* ..... 59.3..... 120		
10.02 Purchasing power parity* ..... 0.5..... 37		
10.04 Fuel price, US\$ cents/liter* ..... 110.0..... 71		
10.03 Extent and effect of taxation ..... 3.3..... 89		
10.05 Hotel price index, US\$* ..... 144.2..... 78		
<b>11th pillar: Human resources</b> ..... 4.2..... 112		
<i>Education and training</i> ..... 4.0..... 108		
11.01 Primary education enrollment, net %* ..... 92.4..... 80		
11.02 Secondary education enrollment, gross %* ..... 42.2..... 119		
11.03 Quality of the educational system ..... 3.7..... 65		
11.04 Local availability specialized research & training ..... 4.1..... 70		
11.05 Extent of staff training ..... 3.8..... 82		
<i>Availability of qualified labor</i> ..... 4.4..... 121		
11.06 Hiring and firing practices ..... 4.9..... 18		
11.07 Ease of hiring foreign labor ..... 5.0..... 10		
11.08 HIV prevalence, % adult pop.* ..... 5.3..... 128		
11.09 Business impact of HIV/AIDS ..... 4.3..... 113		
11.10 Life expectancy, years* ..... 51.6..... 131		
<b>12th pillar: Affinity for Travel &amp; Tourism</b> ..... 4.3..... 103		
12.01 Tourism openness, % of GDP* ..... 1.5..... 126		
12.02 Attitude of population toward foreign visitors ..... 6.4..... 54		
12.03 Extension of business trips recommended ..... 5.4..... 64		
12.04 Degree of customer orientation ..... 4.1..... 109		
<b>13th pillar: Natural resources</b> ..... 4.5..... 32		
13.01 No. of World Heritage natural sites* ..... 2..... 25		
13.02 Quality of the natural environment ..... 3.9..... 94		
13.03 Total known species* ..... 1,401..... 15		
13.04 Terrestrial biome protection (0–17%)* ..... 9.2..... 80		
13.05 Marine protected areas, %* ..... 0.2..... 74		
<b>14th pillar: Cultural resources</b> ..... 1.1..... 136		
14.01 No. of World Heritage cultural sites* ..... 0..... 125		
14.02 Sports stadiums, seats/million pop.* ..... 11,532.5..... 106		
14.03 No. of int'l fairs and exhibitions* ..... 4.7..... 96		
14.04 Creative industries exports, % of world total* ..... 0.0..... 121		

# Canada

## Key indicators

Population (millions), 2011 .....	35.7
Surface area (1,000 square kilometers), 2011 .....	9,984.7
Gross domestic product (current US\$ billions), 2011 .....	1,739.0
Gross domestic product (current PPP, \$) per capita, 2011 .....	40,519.1
Real GDP growth (percent), 2011 .....	2.4
Environmental Performance Index 2012, rank (out of 132 economies), 2011 .....	37

## Travel & Tourism indicators

### T&T industry, 2012 estimates

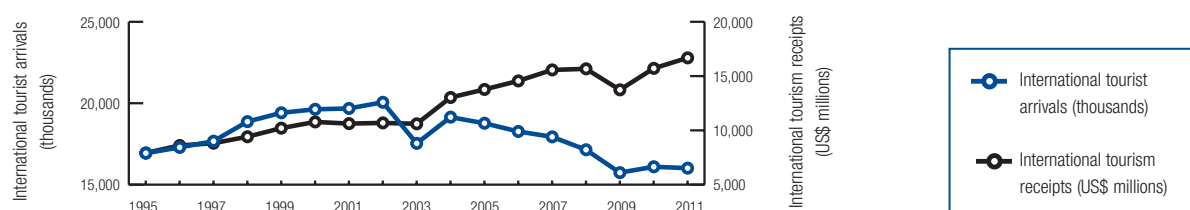
	Absolute value	Percent of total	T&T industry GDP growth forecast (2013–2022)
T&T industry GDP (US\$ millions).....	18,897.0	1.1	2.9
T&T industry employment (1,000 jobs) .....	313.2	1.8	0.2

### T&T economy, 2012 estimates

T&T economy GDP (US\$ millions) .....	77,804	4.4	2.8
T&T economy employment (1,000 jobs) .....	924	5.3	0.7

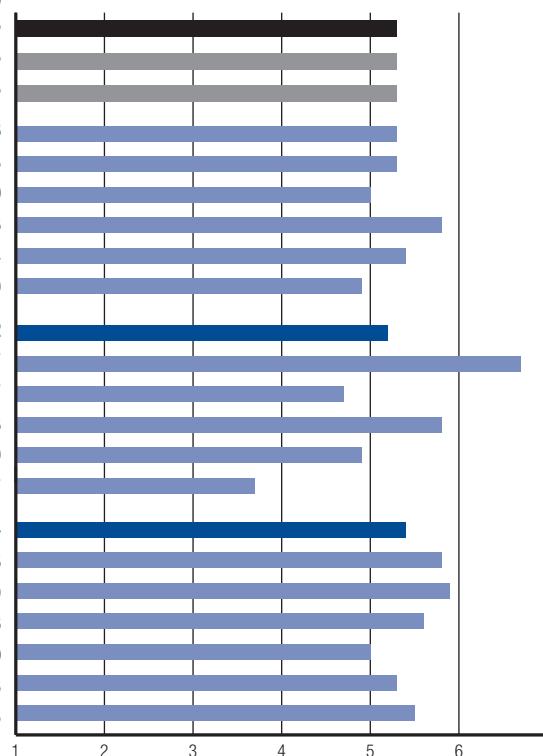
International tourist arrivals (thousands), 2011 ..... 16,014.4

International tourism receipts (US\$, millions), 2011 ..... 16,679.6



## The Travel & Tourism Competitiveness Index

	Rank (out of 140)	Score (1–7)
<b>2013 Travel &amp; Tourism Competitiveness Index</b> .....	<b>8</b>	<b>5.3</b>
2011 Travel & Tourism Competitiveness Index.....	9	5.3
2009 Travel & Tourism Competitiveness Index.....	5	5.3
<b>T&amp;T regulatory framework</b> .....	<b>27</b>	<b>5.3</b>
Policy rules and regulations .....	10	5.3
Environmental sustainability .....	41	5.0
Safety and security.....	18	5.8
Health and hygiene.....	53	5.4
Prioritization of Travel & Tourism .....	37	4.9
<b>Business environment and infrastructure</b> .....	<b>8</b>	<b>5.2</b>
Air transport infrastructure .....	1	6.7
Ground transport infrastructure.....	33	4.7
Tourism infrastructure .....	21	5.8
ICT infrastructure .....	23	4.9
Price competitiveness in the T&T industry .....	124	3.7
<b>T&amp;T human, cultural, and natural resources</b> .....	<b>5</b>	<b>5.4</b>
Human resources .....	5	5.8
Education and training.....	8	5.9
Availability of qualified labor.....	11	5.6
Affinity for Travel & Tourism .....	34	5.0
Natural resources .....	10	5.3
Cultural resources.....	16	5.5



**Note:** For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" on page 83.



# Canada

## The Travel & Tourism Competitiveness Index in detail

INDICATOR	SCORE	RANK
<b>1st pillar: Policy rules and regulations</b> ..... 5.3 ..... <b>10</b>		
1.01 Prevalence of foreign ownership ..... 5.7 ..... <b>10</b>		
1.02 Property rights ..... 6.0 ..... <b>8</b>		
1.03 Business impact of rules on FDI ..... 4.7 ..... 59		
1.04 Visa requirements, no. of countries* ..... 54.0 ..... 106		
1.05 Openness bilateral ASAs (0–38)* ..... 19.5 ..... 14		
1.06 Transparency of government policymaking ..... 5.4 ..... 11		
1.07 No. of days to start a business* ..... 5 ..... <b>10</b>		
1.08 Cost to start a business, % GNI/capita* ..... 0.4 ..... <b>5</b>		
1.09 GATS commitment restrictiveness (0–100)* ..... 66.2 ..... 48		
<b>2nd pillar: Environmental sustainability</b> ..... 5.0 ..... <b>41</b>		
2.01 Stringency of environmental regulation ..... 5.1 ..... 29		
2.02 Enforcement of environmental regulation ..... 5.2 ..... 24		
2.03 Sustainability of T&T industry development ..... 5.0 ..... 30		
2.04 Carbon dioxide emission, million tons/capita* ..... 16.3 ..... 128		
2.05 Particulate matter concentration, µg/m <sup>3</sup> * ..... 15.6 ..... 21		
2.06 Threatened species, %* ..... 3.6 ..... 43		
2.07 Environm. treaty ratification (0–25)* ..... 20 ..... 53		
<b>3rd pillar: Safety and security</b> ..... 5.8 ..... <b>18</b>		
3.01 Business costs of crime and violence ..... 5.6 ..... 32		
3.02 Reliability of police services ..... 6.2 ..... <b>8</b>		
3.03 Road traffic accidents/100,000 pop.* ..... 8.8 ..... 19		
3.04 Business costs of terrorism ..... 5.5 ..... 80		
<b>4th pillar: Health and hygiene</b> ..... 5.4 ..... <b>53</b>		
4.01 Physician density/1,000 pop.* ..... 2.0 ..... 58		
4.02 Access to improved sanitation, % pop.* ..... 100.0 ..... <b>1</b>		
4.03 Access to improved drinking water, % pop.* ..... 100.0 ..... <b>1</b>		
4.04 Hospital beds/10,000 pop.* ..... 32.0 ..... 58		
<b>5th pillar: Prioritization of Travel &amp; Tourism</b> ..... 4.9 ..... <b>37</b>		
5.01 Government prioritization of the T&T industry ..... 5.7 ..... 48		
5.02 T&T gov't expenditure, % gov't budget* ..... 4.1 ..... 49		
5.03 Effectiveness of marketing to attract tourists ..... 5.3 ..... 27		
5.04 Comprehensiveness of T&T data (0–120)* ..... 70.0 ..... 54		
5.05 Timeliness of T&T data (0–18)* ..... 15.5 ..... 48		
<b>6th pillar: Air transport infrastructure</b> ..... 6.7 ..... <b>1</b>		
6.01 Quality of air transport infrastructure ..... 5.9 ..... 23		
6.02 Airline seat kms/week, dom., millions* ..... 1,159.9 ..... <b>8</b>		
6.03 Airline seat kms/week, int'l, millions* ..... 2,043.1 ..... 12		
6.04 Departures/1,000 pop.* ..... 36.2 ..... <b>8</b>		
6.05 Airport density/million pop.* ..... 7.5 ..... <b>5</b>		
6.06 No. of operating airlines* ..... 103.5 ..... <b>9</b>		
6.07 International air transport network ..... 6.0 ..... 17		
<b>7th pillar: Ground transport infrastructure</b> ..... 4.7 ..... <b>33</b>		
7.01 Quality of roads ..... 5.9 ..... 16		
7.02 Quality of railroad infrastructure ..... 5.0 ..... 15		
7.03 Quality of port infrastructure ..... 5.7 ..... 16		
7.04 Quality of ground transport network ..... 5.6 ..... 19		
7.05 Road density/million pop.* ..... 14.0 ..... 100		

INDICATOR	SCORE	RANK
<b>8th pillar: Tourism infrastructure</b> ..... 5.8 ..... <b>21</b>		
8.01 Hotel rooms/100 pop.* ..... 1.2 ..... 23		
8.02 Presence of major car rental co. (1–7)* ..... 5 ..... 66		
8.03 ATMs accepting Visa cards/million pop.* ..... 698.2 ..... 17		
<b>9th pillar: ICT infrastructure</b> ..... 4.9 ..... <b>23</b>		
9.01 ICT use for B-to-B transactions ..... 5.7 ..... 27		
9.02 ICT use for B-to-C transactions ..... 5.6 ..... 17		
9.03 Individuals using the Internet, %* ..... 83.0 ..... 12		
9.04 Fixed telephone lines/100 pop.* ..... 53.0 ..... 11		
9.05 Broadband Internet subscribers/100 pop.* ..... 31.8 ..... 12		
9.06 Mobile telephone subscriptions/100 pop.* ..... 79.7 ..... 107		
9.07 Mobile broadband subscriptions/100 pop.* ..... 38.4 ..... 30		
<b>10th pillar: Price competitiveness in T&amp;T ind.</b> ..... 3.7 ..... <b>124</b>		
10.01 Ticket taxes and airport charges (0–100)* ..... 36.7 ..... 136		
10.02 Purchasing power parity* ..... 1.2 ..... 131		
10.04 Fuel price, US\$ cents/liter* ..... 108.0 ..... 68		
10.03 Extent and effect of taxation ..... 4.1 ..... 27		
10.05 Hotel price index, US\$* ..... 129.3 ..... 59		
<b>11th pillar: Human resources</b> ..... 5.8 ..... <b>5</b>		
<i>Education and training</i> ..... 5.9 ..... <b>8</b>		
11.01 Primary education enrollment, net %* ..... 99.8 ..... <b>3</b>		
11.02 Secondary education enrollment, gross %* ..... 101.3 ..... 24		
11.03 Quality of the educational system ..... 5.4 ..... <b>6</b>		
11.04 Local availability specialized research & training ..... 5.5 ..... 13		
11.05 Extent of staff training ..... 4.7 ..... 23		
<i>Availability of qualified labor</i> ..... 5.6 ..... 11		
11.06 Hiring and firing practices ..... 4.9 ..... 14		
11.07 Ease of hiring foreign labor ..... 4.0 ..... 85		
11.08 HIV prevalence, % adult pop.* ..... 0.2 ..... 52		
11.09 Business impact of HIV/AIDS ..... 5.8 ..... 37		
11.10 Life expectancy, years* ..... 80.8 ..... 14		
<b>12th pillar: Affinity for Travel &amp; Tourism</b> ..... 5.0 ..... <b>34</b>		
12.01 Tourism openness, % of GDP* ..... 2.9 ..... 102		
12.02 Attitude of population toward foreign visitors ..... 6.6 ..... 12		
12.03 Extension of business trips recommended ..... 6.2 ..... 12		
12.04 Degree of customer orientation ..... 5.5 ..... 13		
<b>13th pillar: Natural resources</b> ..... 5.3 ..... <b>10</b>		
13.01 No. of World Heritage natural sites* ..... 9 ..... <b>5</b>		
13.02 Quality of the natural environment ..... 6.2 ..... <b>9</b>		
13.03 Total known species* ..... 785 ..... 45		
13.04 Terrestrial biome protection (0–17%)* ..... 7.6 ..... 90		
13.05 Marine protected areas, %* ..... 0.7 ..... 48		
<b>14th pillar: Cultural resources</b> ..... 5.5 ..... <b>16</b>		
14.01 No. of World Heritage cultural sites* ..... 7 ..... 39		
14.02 Sports stadiums, seats/million pop.* ..... 55,253.0 ..... 45		
14.03 No. of int'l fairs and exhibitions* ..... 252.0 ..... 11		
14.04 Creative industries exports, % of world total* ..... 1.6 ..... 13		

# Cape Verde

## Key indicators

Population (millions), 2011 .....	0.5
Surface area (1,000 square kilometers), 2011 .....	4.0
Gross domestic product (current US\$ billions), 2011 .....	1.9
Gross domestic product (current PPP, \$) per capita, 2011 .....	3,947.2
Real GDP growth (percent), 2011 .....	5.0
Environmental Performance Index 2012, rank (out of 132 economies), 2011 .....	n/a

## Travel & Tourism indicators

### T&T industry, 2012 estimates

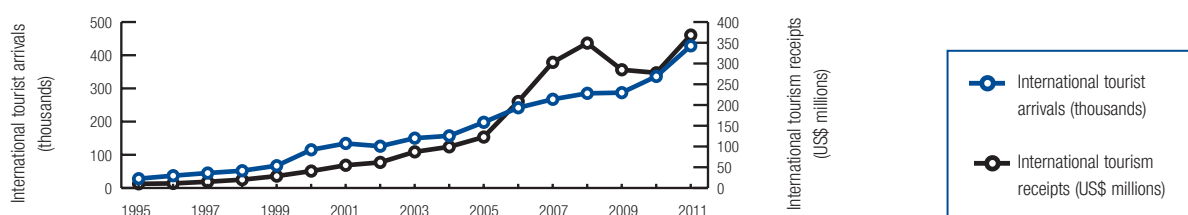
	Absolute value	Percent of total	T&T industry GDP growth forecast (2013–2022)
T&T industry GDP (US\$ millions) .....	332.7	16.6	5.8
T&T industry employment (1,000 jobs) .....	30.2	14.7	3.5

### T&T economy, 2012 estimates

T&T economy GDP (US\$ millions) .....	885	44.1	6.4
T&T economy employment (1,000 jobs) .....	81	39.3	3.9

International tourist arrivals (thousands), 2011 .....428.3

International tourism receipts (US\$, millions), 2011 .....368.6



## The Travel & Tourism Competitiveness Index

	Rank (out of 140)	Score (1–7)
2013 Travel & Tourism Competitiveness Index .....	87	3.9
2011 Travel & Tourism Competitiveness Index .....	89	3.8
2009 Travel & Tourism Competitiveness Index .....	n/a	n/a

### T&T regulatory framework .....79 .....4.4

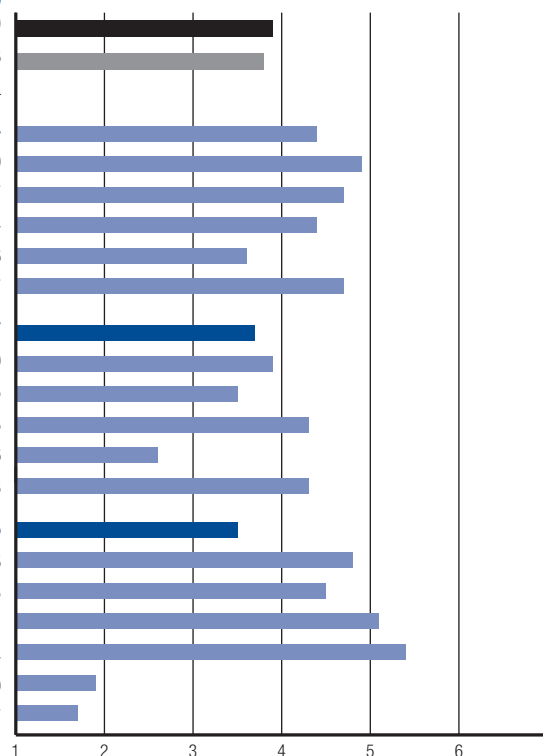
Policy rules and regulations .....	39	4.9
Environmental sustainability .....	54	4.7
Safety and security .....	88	4.4
Health and hygiene .....	101	3.6
Prioritization of Travel & Tourism .....	46	4.7

### Business environment and infrastructure .....66 .....3.7

Air transport infrastructure .....	46	3.9
Ground transport infrastructure .....	72	3.5
Tourism infrastructure .....	62	4.3
ICT infrastructure .....	95	2.6
Price competitiveness in the T&T industry .....	87	4.3

### T&T human, cultural, and natural resources .....107 .....3.5

Human resources .....	75	4.8
Education and training .....	82	4.5
Availability of qualified labor .....	56	5.1
Affinity for Travel & Tourism .....	14	5.4
Natural resources .....	138	1.9
Cultural resources .....	102	1.7



**Note:** For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" on page 83.

# Cape Verde

## The Travel & Tourism Competitiveness Index in detail

INDICATOR	SCORE	RANK	INDICATOR	SCORE	RANK
<b>1st pillar: Policy rules and regulations ..... 4.9 ..... 39</b>			<b>8th pillar: Tourism infrastructure ..... 4.3 ..... 62</b>		
1.01 Prevalence of foreign ownership ..... 4.6 ..... 78			8.01 Hotel rooms/100 pop.* ..... 1.6 ..... 16		
1.02 Property rights ..... 4.0 ..... 84			8.02 Presence of major car rental co. (1–7)* ..... 2 ..... 111		
1.03 Business impact of rules on FDI ..... 4.5 ..... 82			8.03 ATMs accepting Visa cards/million pop.* ..... 307.6 ..... 64		
1.04 Visa requirements, no. of countries* ..... 141.2 ..... 14					
1.05 Openness bilateral ASAs (0–38)* ..... 11.7 ..... 55			<b>9th pillar: ICT infrastructure ..... 2.6 ..... 95</b>		
1.06 Transparency of government policymaking ..... 4.4 ..... 56			9.01 ICT use for B-to-B transactions ..... 4.7 ..... 91		
1.07 No. of days to start a business* ..... 11 ..... 53			9.02 ICT use for B-to-C transactions ..... 3.8 ..... 106		
1.08 Cost to start a business, % GNI/capita* ..... 14.9 ..... 88			9.03 Individuals using the Internet, %* ..... 32.0 ..... 83		
1.09 GATS commitment restrictiveness (0–100)* ..... n/a ..... n/a			9.04 Fixed telephone lines/100 pop.* ..... 14.9 ..... 83		
			9.05 Broadband Internet subscribers/100 pop.* ..... 4.3 ..... 78		
<b>2nd pillar: Environmental sustainability ..... 4.7 ..... 54</b>			9.06 Mobile telephone subscriptions/100 pop.* ..... 79.2 ..... 108		
2.01 Stringency of environmental regulation ..... 3.6 ..... 91			9.07 Mobile broadband subscriptions/100 pop.* ..... 3.0 ..... 97		
2.02 Enforcement of environmental regulation ..... 3.2 ..... 95					
2.03 Sustainability of T&T industry development ..... 4.3 ..... 77			<b>10th pillar: Price competitiveness in T&amp;T ind. .... 4.3 ..... 87</b>		
2.04 Carbon dioxide emission, million tons/capita* ..... 0.6 ..... 29			10.01 Ticket taxes and airport charges (0–100)* ..... 96.0 ..... 5		
2.05 Particulate matter concentration, µg/m <sup>3</sup> * ..... 26.3 ..... 55			10.02 Purchasing power parity* ..... 0.9 ..... 109		
2.06 Threatened species, %* ..... 6.1 ..... 89			10.04 Fuel price, US\$ cents/liter* ..... 133.0 ..... 93		
2.07 Environm. treaty ratification (0–25)* ..... 19 ..... 71			10.03 Extent and effect of taxation ..... 3.3 ..... 81		
			10.05 Hotel price index, US\$* ..... n/a ..... n/a		
<b>3rd pillar: Safety and security ..... 4.4 ..... 88</b>					
3.01 Business costs of crime and violence ..... 4.0 ..... 102			<b>11th pillar: Human resources ..... 4.8 ..... 75</b>		
3.02 Reliability of police services ..... 4.5 ..... 58			<i>Education and training</i> ..... 4.5 ..... 82		
3.03 Road traffic accidents/100,000 pop.* ..... 25.1 ..... 99			11.01 Primary education enrollment, net %* ..... 93.2 ..... 74		
3.04 Business costs of terrorism ..... 5.5 ..... 78			11.02 Secondary education enrollment, gross %* ..... 87.5 ..... 75		
			11.03 Quality of the educational system ..... 3.8 ..... 63		
<b>4th pillar: Health and hygiene ..... 3.6 ..... 101</b>			11.04 Local availability specialized research & training ..... 3.3 ..... 119		
4.01 Physician density/1,000 pop.* ..... 0.6 ..... 99			11.05 Extent of staff training ..... 3.2 ..... 118		
4.02 Access to improved sanitation, % pop.* ..... 61.0 ..... 101			<i>Availability of qualified labor</i> ..... 5.1 ..... 56		
4.03 Access to improved drinking water, % pop.* ..... 88.0 ..... 97			11.06 Hiring and firing practices ..... 3.6 ..... 96		
4.04 Hospital beds/10,000 pop.* ..... 21.0 ..... 77			11.07 Ease of hiring foreign labor ..... 4.6 ..... 29		
			11.08 HIV prevalence, % adult pop.* ..... 0.8 ..... 96		
<b>5th pillar: Prioritization of Travel &amp; Tourism ..... 4.7 ..... 46</b>			11.09 Business impact of HIV/AIDS ..... 5.0 ..... 86		
5.01 Government prioritization of the T&T industry ..... 5.8 ..... 42			11.10 Life expectancy, years* ..... 73.9 ..... 65		
5.02 T&T gov't expenditure, % gov't budget* ..... 6.2 ..... 25					
5.03 Effectiveness of marketing to attract tourists ..... 4.1 ..... 89			<b>12th pillar: Affinity for Travel &amp; Tourism ..... 5.4 ..... 14</b>		
5.04 Comprehensiveness of T&T data (0–120)* ..... 44.0 ..... 111			12.01 Tourism openness, % of GDP* ..... 26.3 ..... 3		
5.05 Timeliness of T&T data (0–18)* ..... 13.5 ..... 71			12.02 Attitude of population toward foreign visitors ..... 6.2 ..... 71		
			12.03 Extension of business trips recommended ..... 4.9 ..... 100		
<b>6th pillar: Air transport infrastructure ..... 3.9 ..... 46</b>			12.04 Degree of customer orientation ..... 3.6 ..... 134		
6.01 Quality of air transport infrastructure ..... 4.3 ..... 81					
6.02 Airline seat kms/week, dom., millions* ..... 2.3 ..... 67			<b>13th pillar: Natural resources ..... 1.9 ..... 138</b>		
6.03 Airline seat kms/week, int'l, millions* ..... 29.6 ..... 105			13.01 No. of World Heritage natural sites* ..... 0 ..... 79		
6.04 Departures/1,000 pop.* ..... 19.7 ..... 21			13.02 Quality of the natural environment ..... 4.0 ..... 91		
6.05 Airport density/million pop.* ..... 14.0 ..... 3			13.03 Total known species* ..... 114 ..... 139		
6.06 No. of operating airlines* ..... 6.5 ..... 124			13.04 Terrestrial biome protection (0–17%)* ..... 2.5 ..... 118		
6.07 International air transport network ..... 4.4 ..... 82			13.05 Marine protected areas, %* ..... 0.0 ..... 104		
<b>7th pillar: Ground transport infrastructure ..... 3.5 ..... 72</b>			<b>14th pillar: Cultural resources ..... 1.7 ..... 102</b>		
7.01 Quality of roads ..... 4.1 ..... 65			14.01 No. of World Heritage cultural sites* ..... 1 ..... 109		
7.02 Quality of railroad infrastructure ..... n/a ..... n/a			14.02 Sports stadiums, seats/million pop.* ..... 55,934.6 ..... 42		
7.03 Quality of port infrastructure ..... 3.9 ..... 84			14.03 No. of int'l fairs and exhibitions* ..... 0.3 ..... 131		
7.04 Quality of ground transport network ..... 3.9 ..... 107			14.04 Creative industries exports, % of world total* ..... 0.0 ..... 131		
7.05 Road density/million pop.* ..... 33.0 ..... 69					

# Chad

## Key indicators

Population (millions), 2011 .....	11.6
Surface area (1,000 square kilometers), 2011 .....	1,284.0
Gross domestic product (current US\$ billions), 2011 .....	9.3
Gross domestic product (current PPP, \$) per capita, 2011 .....	1,866.8
Real GDP growth (percent), 2011 .....	1.8
Environmental Performance Index 2012, rank (out of 132 economies), 2011 .....	n/a

## Travel & Tourism indicators

### T&T industry, 2012 estimates

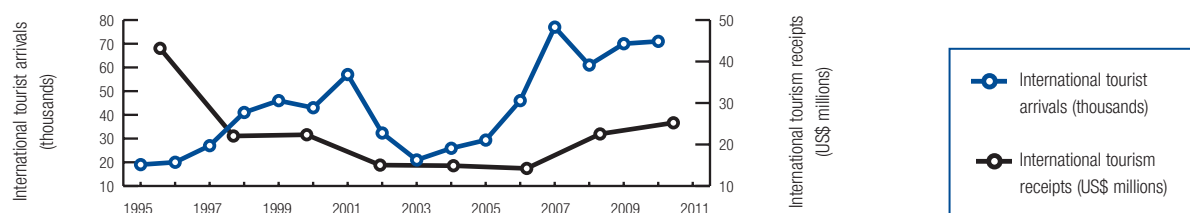
	Absolute value	Percent of total	T&T industry GDP growth forecast (2013–2022)
T&T industry GDP (US\$ millions).....	145.2	1.5	4.4
T&T industry employment (1,000 jobs) .....	26.2	1.3	2.0

### T&T economy, 2012 estimates

T&T economy GDP (US\$ millions) .....	432	4.5	4.3
T&T economy employment (1,000 jobs) .....	80	3.9	3.1

International tourist arrivals (thousands), 2010.....71.0

International tourism receipts (US\$, millions), 2002.....25.2



## The Travel & Tourism Competitiveness Index

	Rank (out of 140)	Score (1–7)	
<b>2013 Travel &amp; Tourism Competitiveness Index.....</b>	<b>139</b>	<b>2.6</b>	
2011 Travel & Tourism Competitiveness Index.....	139	2.6	
2009 Travel & Tourism Competitiveness Index.....	133	2.5	
<b>T&amp;T regulatory framework .....</b>	<b>139</b>	<b>2.9</b>	
Policy rules and regulations .....	139	3.0	
Environmental sustainability .....	111	4.1	
Safety and security.....	138	3.1	
Health and hygiene.....	139	1.1	
Prioritization of Travel & Tourism .....	127	3.1	
<b>Business environment and infrastructure .....</b>	<b>140</b>	<b>2.1</b>	
Air transport infrastructure .....	139	1.8	
Ground transport infrastructure.....	127	2.6	
Tourism infrastructure .....	136	1.3	
ICT infrastructure .....	137	1.5	
Price competitiveness in the T&T industry .....	132	3.4	
<b>T&amp;T human, cultural, and natural resources.....</b>	<b>136</b>	<b>2.8</b>	
Human resources .....	135	3.3	
Education and training.....	139	2.5	
Availability of qualified labor.....	130	4.1	
Affinity for Travel & Tourism .....	134	3.8	
Natural resources .....	95	3.2	
Cultural resources.....	139	1.0	

**Note:** For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" on page 83.

## The Travel &amp; Tourism Competitiveness Index in detail

INDICATOR	SCORE	RANK	INDICATOR	SCORE	RANK
<b>1st pillar: Policy rules and regulations ..... 3.0 ..... 139</b>			<b>8th pillar: Tourism infrastructure ..... 1.3 ..... 136</b>		
1.01 Prevalence of foreign ownership ..... 3.4 ..... 128			8.01 Hotel rooms/100 pop.* ..... 0.0 ..... 137		
1.02 Property rights ..... 2.6 ..... 135			8.02 Presence of major car rental co. (1–7)* ..... 1 ..... 123		
1.03 Business impact of rules on FDI ..... 3.5 ..... 125			8.03 ATMs accepting Visa cards/million pop.* ..... 1.4 ..... 137		
1.04 Visa requirements, no. of countries* ..... 11.0 ..... 130					
1.05 Openness bilateral ASAs (0–38)* ..... 9.2 ..... 93			<b>9th pillar: ICT infrastructure ..... 1.5 ..... 137</b>		
1.06 Transparency of government policymaking ..... 3.1 ..... 134			9.01 ICT use for B-to-B transactions ..... 3.5 ..... 133		
1.07 No. of days to start a business* ..... 62 ..... 132			9.02 ICT use for B-to-C transactions ..... 2.8 ..... 132		
1.08 Cost to start a business, % GNI/capita* ..... 202.0 ..... 139			9.03 Individuals using the Internet, %* ..... 1.9 ..... 135		
1.09 GATS commitment restrictiveness (0–100)* ..... 84.9 ..... 7			9.04 Fixed telephone lines/100 pop.* ..... 0.3 ..... 138		
			9.05 Broadband Internet subscribers/100 pop.* ..... 0.0 ..... 138		
<b>2nd pillar: Environmental sustainability ..... 4.1 ..... 111</b>			9.06 Mobile telephone subscriptions/100 pop.* ..... 31.8 ..... 137		
2.01 Stringency of environmental regulation ..... 3.1 ..... 113			9.07 Mobile broadband subscriptions/100 pop.* ..... 0.0 ..... 128		
2.02 Enforcement of environmental regulation ..... 3.4 ..... 81					
2.03 Sustainability of T&T industry development ..... 3.8 ..... 101			<b>10th pillar: Price competitiveness in T&amp;T ind. .... 3.4 ..... 132</b>		
2.04 Carbon dioxide emission, million tons/capita* ..... 0.0 ..... 3			10.01 Ticket taxes and airport charges (0–100)* ..... 0.0 ..... 140		
2.05 Particulate matter concentration, µg/m <sup>3</sup> * ..... 81.8 ..... 127			10.02 Purchasing power parity* ..... 0.5 ..... 38		
2.06 Threatened species, %* ..... 3.6 ..... 44			10.04 Fuel price, US\$ cents/liter* ..... 131.0 ..... 91		
2.07 Environm. treaty ratification (0–25)* ..... 17 ..... 96			10.03 Extent and effect of taxation ..... 2.6 ..... 128		
			10.05 Hotel price index, US\$* ..... 135.7 ..... 68		
<b>3rd pillar: Safety and security ..... 3.1 ..... 138</b>					
3.01 Business costs of crime and violence ..... 3.6 ..... 113			<b>11th pillar: Human resources ..... 3.3 ..... 135</b>		
3.02 Reliability of police services ..... 2.4 ..... 135			<i>Education and training</i> ..... 2.5 ..... 139		
3.03 Road traffic accidents/100,000 pop.* ..... 34.3 ..... 126			11.01 Primary education enrollment, net %* ..... 62.3 ..... 135		
3.04 Business costs of terrorism ..... 4.4 ..... 121			11.02 Secondary education enrollment, gross %* ..... 24.6 ..... 137		
			11.03 Quality of the educational system ..... 3.0 ..... 112		
<b>4th pillar: Health and hygiene ..... 1.1 ..... 139</b>			11.04 Local availability specialized research & training... 3.3 ..... 116		
4.01 Physician density/1,000 pop.* ..... 0.0 ..... 132			11.05 Extent of staff training ..... 2.9 ..... 136		
4.02 Access to improved sanitation, % pop.* ..... 13.0 ..... 135			<i>Availability of qualified labor</i> ..... 4.1 ..... 130		
4.03 Access to improved drinking water, % pop.* ..... 51.0 ..... 135			11.06 Hiring and firing practices ..... 4.7 ..... 23		
4.04 Hospital beds/10,000 pop.* ..... 4.3 ..... 131			11.07 Ease of hiring foreign labor ..... 4.2 ..... 66		
			11.08 HIV prevalence, % adult pop.* ..... 3.4 ..... 125		
<b>5th pillar: Prioritization of Travel &amp; Tourism ..... 3.1 ..... 127</b>			11.09 Business impact of HIV/AIDS ..... 2.9 ..... 134		
5.01 Government prioritization of the T&T industry ..... 4.2 ..... 118			11.10 Life expectancy, years* ..... 49.5 ..... 136		
5.02 T&T gov't expenditure, % gov't budget* ..... 3.9 ..... 55					
5.03 Effectiveness of marketing to attract tourists ..... 3.5 ..... 118			<b>12th pillar: Affinity for Travel &amp; Tourism ..... 3.8 ..... 134</b>		
5.04 Comprehensiveness of T&T data (0–120)* ..... 20.0 ..... 135			12.01 Tourism openness, % of GDP* ..... 5.3 ..... 57		
5.05 Timeliness of T&T data (0–18)* ..... 0.0 ..... 126			12.02 Attitude of population toward foreign visitors ..... 5.7 ..... 124		
			12.03 Extension of business trips recommended ..... 4.1 ..... 135		
<b>6th pillar: Air transport infrastructure ..... 1.8 ..... 139</b>			12.04 Degree of customer orientation ..... 3.1 ..... 139		
6.01 Quality of air transport infrastructure ..... 2.9 ..... 133					
6.02 Airline seat kms/week, dom., millions* ..... 0.2 ..... 94			<b>13th pillar: Natural resources ..... 3.2 ..... 95</b>		
6.03 Airline seat kms/week, int'l, millions* ..... 9.2 ..... 128			13.01 No. of World Heritage natural sites* ..... 1 ..... 45		
6.04 Departures/1,000 pop.* ..... 0.1 ..... 127			13.02 Quality of the natural environment ..... 2.8 ..... 133		
6.05 Airport density/million pop.* ..... 0.1 ..... 135			13.03 Total known species* ..... 659 ..... 56		
6.06 No. of operating airlines* ..... 5.5 ..... 129			13.04 Terrestrial biome protection (0–17%)* ..... 9.4 ..... 79		
6.07 International air transport network ..... 3.2 ..... 136			13.05 Marine protected areas, %* ..... n/a ..... n/a		
<b>7th pillar: Ground transport infrastructure ..... 2.6 ..... 127</b>			<b>14th pillar: Cultural resources ..... 1.0 ..... 139</b>		
7.01 Quality of roads ..... 3.1 ..... 101			14.01 No. of World Heritage cultural sites* ..... 0 ..... 125		
7.02 Quality of railroad infrastructure ..... n/a ..... n/a			14.02 Sports stadiums, seats/million pop.* ..... 1,735.3 ..... 139		
7.03 Quality of port infrastructure ..... 2.8 ..... 128			14.03 No. of int'l fairs and exhibitions* ..... n/a ..... n/a		
7.04 Quality of ground transport network ..... 3.5 ..... 127			14.04 Creative industries exports, % of world total* ..... n/a ..... n/a		
7.05 Road density/million pop.* ..... 3.0 ..... 135					

# Chile

## Key indicators

Population (millions), 2011 .....	17.6
Surface area (1,000 square kilometers), 2011 .....	756.1
Gross domestic product (current US\$ billions), 2011 .....	248.4
Gross domestic product (current PPP, \$) per capita, 2011 .....	17,361.0
Real GDP growth (percent), 2011 .....	5.9
Environmental Performance Index 2012, rank (out of 132 economies), 2011 .....	58

## Travel & Tourism indicators

### T&T industry, 2012 estimates

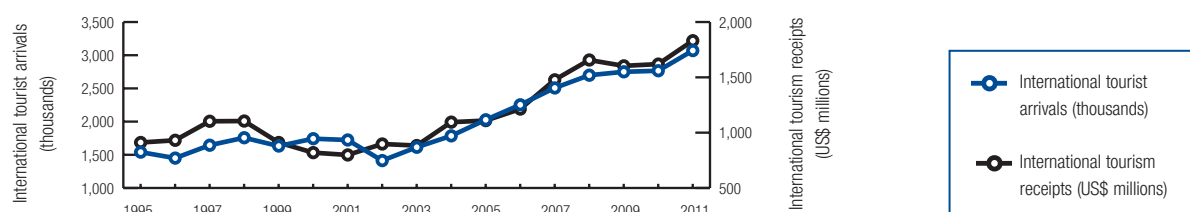
	Absolute value	Percent of total	T&T industry GDP growth forecast (2013–2022)
T&T industry GDP (US\$ millions).....	6,976.0	2.9	3.9
T&T industry employment (1,000 jobs) .....	215.1	2.8	1.1

### T&T economy, 2012 estimates

T&T economy GDP (US\$ millions) .....	20,272	8.4	4.1
T&T economy employment (1,000 jobs) .....	604	8.0	1.0

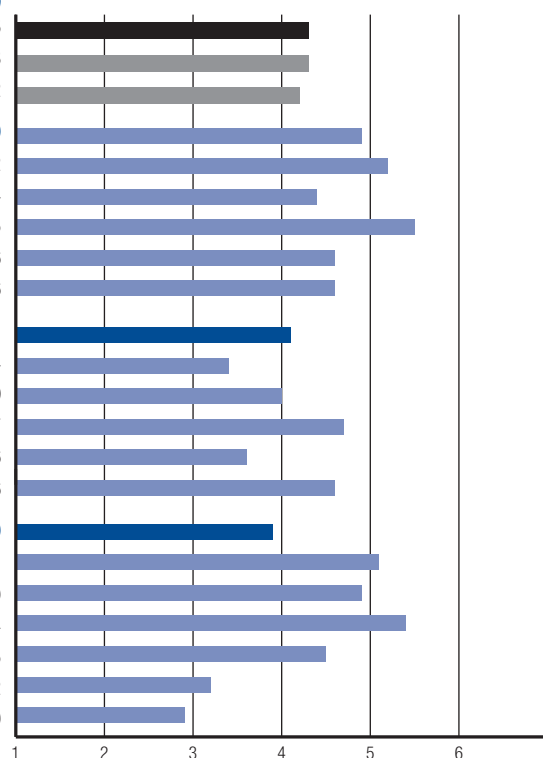
International tourist arrivals (thousands), 2011 .....3,069.8

International tourism receipts (US\$, millions), 2011 .....1,831.0



## The Travel & Tourism Competitiveness Index

	Rank (out of 140)	Score (1–7)
<b>2013 Travel &amp; Tourism Competitiveness Index .....</b>	<b>56</b>	<b>4.3</b>
2011 Travel & Tourism Competitiveness Index .....	57	4.3
2009 Travel & Tourism Competitiveness Index .....	57	4.2
<b>T&amp;T regulatory framework .....</b>	<b>53</b>	<b>4.9</b>
Policy rules and regulations .....	12	5.2
Environmental sustainability .....	88	4.4
Safety and security .....	31	5.5
Health and hygiene .....	75	4.6
Prioritization of Travel & Tourism .....	56	4.6
<b>Business environment and infrastructure .....</b>	<b>53</b>	<b>4.1</b>
Air transport infrastructure .....	55	3.4
Ground transport infrastructure .....	56	4.0
Tourism infrastructure .....	49	4.7
ICT infrastructure .....	52	3.6
Price competitiveness in the T&T industry .....	60	4.6
<b>T&amp;T human, cultural, and natural resources .....</b>	<b>65</b>	<b>3.9</b>
Human resources .....	39	5.1
Education and training .....	54	4.9
Availability of qualified labor .....	23	5.4
Affinity for Travel & Tourism .....	89	4.5
Natural resources .....	93	3.2
Cultural resources .....	53	2.9



**Note:** For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" on page 83.

## The Travel &amp; Tourism Competitiveness Index in detail

INDICATOR	SCORE	RANK	INDICATOR	SCORE	RANK
<b>1st pillar: Policy rules and regulations</b> ..... 5.2 ..... 12			<b>8th pillar: Tourism infrastructure</b> ..... 4.7 ..... 49		
1.01 Prevalence of foreign ownership ..... 5.7 ..... 14			8.01 Hotel rooms/100 pop.* ..... 0.4 ..... 62		
1.02 Property rights ..... 5.2 ..... 37			8.02 Presence of major car rental co. (1–7)* ..... 6 ..... 32		
1.03 Business impact of rules on FDI ..... 5.5 ..... 12			8.03 ATMs accepting Visa cards/million pop.* ..... 502.3 ..... 35		
1.04 Visa requirements, no. of countries* ..... 88.0 ..... 44					
1.05 Openness bilateral ASAs (0–38)* ..... 17.7 ..... 18			<b>9th pillar: ICT infrastructure</b> ..... 3.6 ..... 52		
1.06 Transparency of government policymaking ..... 5.3 ..... 15			9.01 ICT use for B-to-B transactions ..... 5.5 ..... 38		
1.07 No. of days to start a business* ..... 8 ..... 33			9.02 ICT use for B-to-C transactions ..... 5.2 ..... 31		
1.08 Cost to start a business, % GNI/capita* ..... 4.5 ..... 48			9.03 Individuals using the Internet, %* ..... 53.9 ..... 50		
1.09 GATS commitment restrictiveness (0–100)* ..... 50.0 ..... 85			9.04 Fixed telephone lines/100 pop.* ..... 19.5 ..... 67		
			9.05 Broadband Internet subscribers/100 pop.* ..... 11.6 ..... 49		
<b>2nd pillar: Environmental sustainability</b> ..... 4.4 ..... 88			9.06 Mobile telephone subscriptions/100 pop.* ..... 129.7 ..... 31		
2.01 Stringency of environmental regulation ..... 4.5 ..... 51			9.07 Mobile broadband subscriptions/100 pop.* ..... 18.0 ..... 59		
2.02 Enforcement of environmental regulation ..... 4.4 ..... 38					
2.03 Sustainability of T&T industry development ..... 4.4 ..... 70			<b>10th pillar: Price competitiveness in T&amp;T ind.</b> ..... 4.6 ..... 60		
2.04 Carbon dioxide emission, million tons/capita* ..... 4.4 ..... 73			10.01 Ticket taxes and airport charges (0–100)* ..... 83.4 ..... 51		
2.05 Particulate matter concentration, µg/m <sup>3</sup> * ..... 53.3 ..... 104			10.02 Purchasing power parity* ..... 0.8 ..... 98		
2.06 Threatened species, %* ..... 11.6 ..... 121			10.04 Fuel price, US\$ cents/liter* ..... 102.0 ..... 61		
2.07 Environm. treaty ratification (0–25)* ..... 21 ..... 39			10.03 Extent and effect of taxation ..... 4.3 ..... 22		
			10.05 Hotel price index, US\$* ..... 148.6 ..... 81		
<b>3rd pillar: Safety and security</b> ..... 5.5 ..... 31					
3.01 Business costs of crime and violence ..... 5.0 ..... 63			<b>11th pillar: Human resources</b> ..... 5.1 ..... 39		
3.02 Reliability of police services ..... 6.1 ..... 14			<i>Education and training</i> ..... 4.9 ..... 54		
3.03 Road traffic accidents/100,000 pop.* ..... 13.7 ..... 52			11.01 Primary education enrollment, net %* ..... 93.6 ..... 71		
3.04 Business costs of terrorism ..... 5.9 ..... 48			11.02 Secondary education enrollment, gross %* ..... 87.9 ..... 74		
			11.03 Quality of the educational system ..... 3.4 ..... 90		
<b>4th pillar: Health and hygiene</b> ..... 4.6 ..... 75			11.04 Local availability specialized research & training ..... 4.7 ..... 36		
4.01 Physician density/1,000 pop.* ..... 1.0 ..... 88			11.05 Extent of staff training ..... 4.3 ..... 38		
4.02 Access to improved sanitation, % pop.* ..... 96.0 ..... 49			<i>Availability of qualified labor</i> ..... 5.4 ..... 23		
4.03 Access to improved drinking water, % pop.* ..... 96.0 ..... 63			11.06 Hiring and firing practices ..... 3.6 ..... 92		
4.04 Hospital beds/10,000 pop.* ..... 21.0 ..... 77			11.07 Ease of hiring foreign labor ..... 4.6 ..... 36		
			11.08 HIV prevalence, % adult pop.* ..... 0.4 ..... 76		
<b>5th pillar: Prioritization of Travel &amp; Tourism</b> ..... 4.6 ..... 56			11.09 Business impact of HIV/AIDS ..... 5.6 ..... 52		
5.01 Government prioritization of the T&T industry ..... 4.8 ..... 94			11.10 Life expectancy, years* ..... 79.0 ..... 32		
5.02 T&T gov't expenditure, % gov't budget* ..... 4.1 ..... 48					
5.03 Effectiveness of marketing to attract tourists ..... 4.4 ..... 71			<b>12th pillar: Affinity for Travel &amp; Tourism</b> ..... 4.5 ..... 89		
5.04 Comprehensiveness of T&T data (0–120)* ..... 77.0 ..... 34			12.01 Tourism openness, % of GDP* ..... 1.4 ..... 129		
5.05 Timeliness of T&T data (0–18)* ..... 16.5 ..... 17			12.02 Attitude of population toward foreign visitors ..... 6.1 ..... 84		
			12.03 Extension of business trips recommended ..... 5.8 ..... 38		
<b>6th pillar: Air transport infrastructure</b> ..... 3.4 ..... 55			12.04 Degree of customer orientation ..... 4.6 ..... 68		
6.01 Quality of air transport infrastructure ..... 5.5 ..... 39					
6.02 Airline seat kms/week, dom., millions* ..... 177.6 ..... 26			<b>13th pillar: Natural resources</b> ..... 3.2 ..... 93		
6.03 Airline seat kms/week, int'l, millions* ..... 298.1 ..... 48			13.01 No. of World Heritage natural sites* ..... 0 ..... 79		
6.04 Departures/1,000 pop.* ..... 6.4 ..... 50			13.02 Quality of the natural environment ..... 4.2 ..... 78		
6.05 Airport density/million pop.* ..... 1.0 ..... 41			13.03 Total known species* ..... 637 ..... 57		
6.06 No. of operating airlines* ..... 23.5 ..... 74			13.04 Terrestrial biome protection (0–17%)* ..... 10.2 ..... 74		
6.07 International air transport network ..... 5.7 ..... 33			13.05 Marine protected areas, %* ..... 0.3 ..... 68		
<b>7th pillar: Ground transport infrastructure</b> ..... 4.0 ..... 56			<b>14th pillar: Cultural resources</b> ..... 2.9 ..... 53		
7.01 Quality of roads ..... 5.6 ..... 23			14.01 No. of World Heritage cultural sites* ..... 6 ..... 45		
7.02 Quality of railroad infrastructure ..... 2.6 ..... 63			14.02 Sports stadiums, seats/million pop.* ..... 46,153.6 ..... 59		
7.03 Quality of port infrastructure ..... 5.2 ..... 34			14.03 No. of int'l fairs and exhibitions* ..... 92.7 ..... 36		
7.04 Quality of ground transport network ..... 5.4 ..... 25			14.04 Creative industries exports, % of world total* ..... 0.1 ..... 52		
7.05 Road density/million pop.* ..... 10.0 ..... 116					



# China

## Key indicators

Population (millions), 2011 .....	1,367.0
Surface area (1,000 square kilometers), 2011 .....	9,600.0
Gross domestic product (current US\$ billions), 2011 .....	7,298.1
Gross domestic product (current PPP, \$) per capita, 2011 .....	8,386.7
Real GDP growth (percent), 2011 .....	9.2
Environmental Performance Index 2012, rank (out of 132 economies), 2011 .....	116

## Travel & Tourism indicators

### T&T industry, 2012 estimates

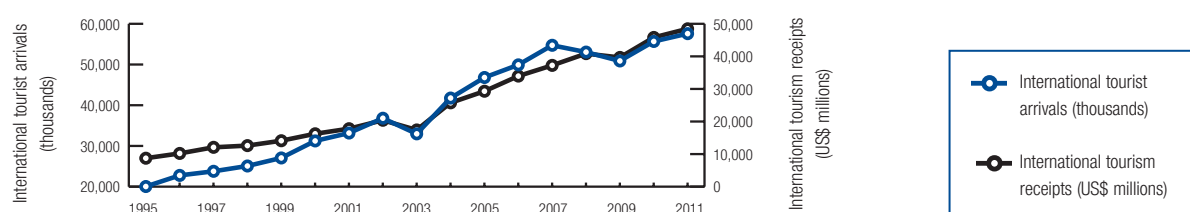
	Absolute value	Percent of total	T&T industry GDP growth forecast (2013–2022)
T&T industry GDP (US\$ millions).....	199,322.0	2.6	9.2
T&T industry employment (1,000 jobs) .....	22,500.2	2.9	1.6

### T&T economy, 2012 estimates

T&T economy GDP (US\$ millions) .....	704,527	9.3	9.2
T&T economy employment (1,000 jobs) .....	63,311	8.3	3.3

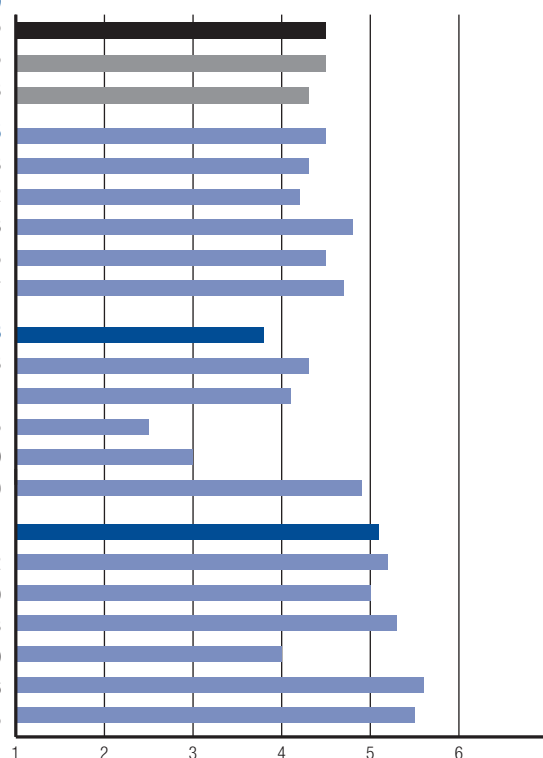
International tourist arrivals (thousands), 2011 .....57,580.6

International tourism receipts (US\$, millions), 2011 .....48,464.0



## The Travel & Tourism Competitiveness Index

	Rank (out of 140)	Score (1–7)
<b>2013 Travel &amp; Tourism Competitiveness Index.....</b>	<b>45</b>	<b>4.5</b>
2011 Travel & Tourism Competitiveness Index.....	39	4.5
2009 Travel & Tourism Competitiveness Index.....	47	4.3
<b>T&amp;T regulatory framework .....</b>	<b>71</b>	<b>4.5</b>
Policy rules and regulations .....	86	4.3
Environmental sustainability .....	109	4.2
Safety and security.....	67	4.8
Health and hygiene.....	82	4.5
Prioritization of Travel & Tourism .....	45	4.7
<b>Business environment and infrastructure .....</b>	<b>63</b>	<b>3.8</b>
Air transport infrastructure .....	35	4.3
Ground transport infrastructure.....	51	4.1
Tourism infrastructure .....	101	2.5
ICT infrastructure .....	74	3.0
Price competitiveness in the T&T industry .....	37	4.9
<b>T&amp;T human, cultural, and natural resources.....</b>	<b>13</b>	<b>5.1</b>
Human resources .....	38	5.2
Education and training.....	43	5.0
Availability of qualified labor.....	26	5.3
Affinity for Travel & Tourism .....	129	4.0
Natural resources .....	5	5.6
Cultural resources.....	15	5.5



**Note:** For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" on page 83.

## China

## The Travel &amp; Tourism Competitiveness Index in detail

INDICATOR	SCORE	RANK	INDICATOR	SCORE	RANK
<b>1st pillar: Policy rules and regulations ..... 4.3 ..... 86</b>			<b>8th pillar: Tourism infrastructure ..... 2.5 ..... 101</b>		
1.01 Prevalence of foreign ownership ..... 4.3 ..... 97			8.01 Hotel rooms/100 pop.* ..... 0.1 ..... 109		
1.02 Property rights ..... 4.9 ..... 46			8.02 Presence of major car rental co. (1–7)* ..... 3 ..... 97		
1.03 Business impact of rules on FDI ..... 5.0 ..... 41			8.03 ATMs accepting Visa cards/million pop.* ..... 186.0 ..... 85		
1.04 Visa requirements, no. of countries* ..... 3.0 ..... 139					
1.05 Openness bilateral ASAs (0–38)* ..... 7.1 ..... 113			<b>9th pillar: ICT infrastructure ..... 3.0 ..... 74</b>		
1.06 Transparency of government policymaking ..... 4.5 ..... 49			9.01 ICT use for B-to-B transactions ..... 4.7 ..... 89		
1.07 No. of days to start a business* ..... 33 ..... 111			9.02 ICT use for B-to-C transactions ..... 4.9 ..... 47		
1.08 Cost to start a business, % GNI/capita* ..... 2.1 ..... 31			9.03 Individuals using the Internet, %* ..... 38.3 ..... 74		
1.09 GATS commitment restrictiveness (0–100)* ..... 71.7 ..... 39			9.04 Fixed telephone lines/100 pop.* ..... 21.2 ..... 59		
			9.05 Broadband Internet subscribers/100 pop.* ..... 11.6 ..... 48		
<b>2nd pillar: Environmental sustainability ..... 4.2 ..... 109</b>			9.06 Mobile telephone subscriptions/100 pop.* ..... 73.2 ..... 113		
2.01 Stringency of environmental regulation ..... 4.0 ..... 67			9.07 Mobile broadband subscriptions/100 pop.* ..... 9.5 ..... 76		
2.02 Enforcement of environmental regulation ..... 3.7 ..... 63					
2.03 Sustainability of T&T industry development ..... 4.7 ..... 58			<b>10th pillar: Price competitiveness in T&amp;T ind. .... 4.9 ..... 37</b>		
2.04 Carbon dioxide emission, million tons/capita* ..... 5.3 ..... 85			10.01 Ticket taxes and airport charges (0–100)* ..... 86.0 ..... 37		
2.05 Particulate matter concentration, µg/m <sup>3</sup> * ..... 60.2 ..... 112			10.02 Purchasing power parity* ..... 0.6 ..... 70		
2.06 Threatened species, %* ..... 11.8 ..... 122			10.04 Fuel price, US\$ cents/liter* ..... 104.0 ..... 63		
2.07 Environm. treaty ratification (0–25)* ..... 21 ..... 39			10.03 Extent and effect of taxation ..... 3.9 ..... 39		
			10.05 Hotel price index, US\$* ..... 116.0 ..... 41		
<b>3rd pillar: Safety and security ..... 4.8 ..... 67</b>					
3.01 Business costs of crime and violence ..... 4.8 ..... 68			<b>11th pillar: Human resources ..... 5.2 ..... 38</b>		
3.02 Reliability of police services ..... 4.5 ..... 59			<i>Education and training</i> ..... 5.0 ..... 43		
3.03 Road traffic accidents/100,000 pop.* ..... 16.5 ..... 72			11.01 Primary education enrollment, net %* ..... 99.8 ..... 4		
3.04 Business costs of terrorism ..... 5.1 ..... 98			11.02 Secondary education enrollment, gross %* ..... 81.2 ..... 89		
			11.03 Quality of the educational system ..... 3.9 ..... 56		
<b>4th pillar: Health and hygiene ..... 4.5 ..... 82</b>			11.04 Local availability specialized research & training... 4.4 ..... 55		
4.01 Physician density/1,000 pop.* ..... 1.4 ..... 78			11.05 Extent of staff training ..... 4.2 ..... 45		
4.02 Access to improved sanitation, % pop.* ..... 64.0 ..... 99			<i>Availability of qualified labor</i> ..... 5.3 ..... 26		
4.03 Access to improved drinking water, % pop.* ..... 91.0 ..... 88			11.06 Hiring and firing practices ..... 4.3 ..... 42		
4.04 Hospital beds/10,000 pop.* ..... 42.0 ..... 43			11.07 Ease of hiring foreign labor ..... 4.8 ..... 17		
			11.08 HIV prevalence, % adult pop.* ..... 0.1 ..... 12		
<b>5th pillar: Prioritization of Travel &amp; Tourism ..... 4.7 ..... 45</b>			11.09 Business impact of HIV/AIDS ..... 5.3 ..... 70		
5.01 Government prioritization of the T&T industry ..... 5.0 ..... 85			11.10 Life expectancy, years* ..... 73.3 ..... 77		
5.02 T&T gov't expenditure, % gov't budget* ..... 3.9 ..... 54					
5.03 Effectiveness of marketing to attract tourists ..... 5.1 ..... 42			<b>12th pillar: Affinity for Travel &amp; Tourism ..... 4.0 ..... 129</b>		
5.04 Comprehensiveness of T&T data (0–120)* ..... 67.0 ..... 66			12.01 Tourism openness, % of GDP* ..... 1.7 ..... 123		
5.05 Timeliness of T&T data (0–18)* ..... 18.0 ..... 1			12.02 Attitude of population toward foreign visitors ..... 5.5 ..... 130		
			12.03 Extension of business trips recommended ..... 4.8 ..... 105		
<b>6th pillar: Air transport infrastructure ..... 4.3 ..... 35</b>			12.04 Degree of customer orientation ..... 4.5 ..... 89		
6.01 Quality of air transport infrastructure ..... 4.5 ..... 70					
6.02 Airline seat kms/week, dom., millions* ..... 7,411.9 ..... 2			<b>13th pillar: Natural resources ..... 5.6 ..... 5</b>		
6.03 Airline seat kms/week, int'l, millions* ..... 2,745.2 ..... 8			13.01 No. of World Heritage natural sites* ..... 13 ..... 2		
6.04 Departures/1,000 pop.* ..... 1.8 ..... 86			13.02 Quality of the natural environment ..... 3.6 ..... 115		
6.05 Airport density/million pop.* ..... 0.1 ..... 131			13.03 Total known species* ..... 2,119 ..... 6		
6.06 No. of operating airlines* ..... 112.0 ..... 8			13.04 Terrestrial biome protection (0–17%)* ..... 10.9 ..... 68		
6.07 International air transport network ..... 4.7 ..... 69			13.05 Marine protected areas, %* ..... 0.5 ..... 60		
<b>7th pillar: Ground transport infrastructure ..... 4.1 ..... 51</b>			<b>14th pillar: Cultural resources ..... 5.5 ..... 15</b>		
7.01 Quality of roads ..... 4.4 ..... 54			14.01 No. of World Heritage cultural sites* ..... 70 ..... 1		
7.02 Quality of railroad infrastructure ..... 4.6 ..... 22			14.02 Sports stadiums, seats/million pop.* ..... 3,210.5 ..... 132		
7.03 Quality of port infrastructure ..... 4.4 ..... 59			14.03 No. of int'l fairs and exhibitions* ..... 316.7 ..... 7		
7.04 Quality of ground transport network ..... 4.7 ..... 49			14.04 Creative industries exports, % of world total* ..... 27.7 ..... 1		
7.05 Road density/million pop.* ..... 40.0 ..... 62					

# Colombia

## Key indicators

Population (millions), 2011 .....	47.5
Surface area (1,000 square kilometers), 2011 .....	1,141.8
Gross domestic product (current US\$ billions), 2011 .....	327.6
Gross domestic product (current PPP, \$) per capita, 2011 .....	10,247.0
Real GDP growth (percent), 2011 .....	5.9
Environmental Performance Index 2012, rank (out of 132 economies), 2011 .....	27

## Travel & Tourism indicators

### T&T industry, 2012 estimates

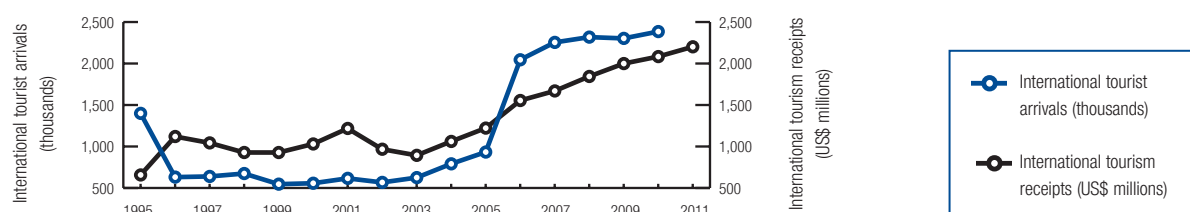
	Absolute value	Percent of total	T&T industry GDP growth forecast (2013–2022)
T&T industry GDP (US\$ millions).....	5,495.3	1.6	3.5
T&T industry employment (1,000 jobs) .....	429.0	2.4	2.0

### T&T economy, 2012 estimates

T&T economy GDP (US\$ millions) .....	16,959	5.1	3.6
T&T economy employment (1,000 jobs) .....	984	5.5	2.0

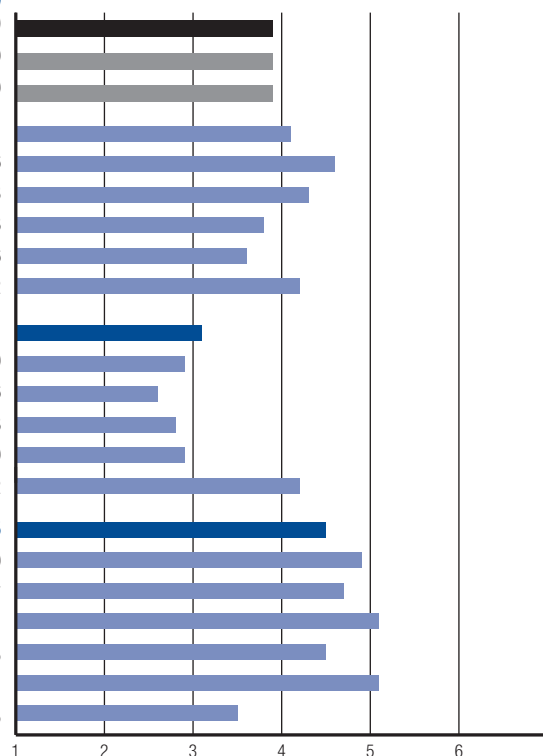
International tourist arrivals (thousands), 2010.....2,384.9

International tourism receipts (US\$, millions), 2011.....2,201.4



## The Travel & Tourism Competitiveness Index

	Rank (out of 140)	Score (1–7)
<b>2013 Travel &amp; Tourism Competitiveness Index.....</b>	<b>84</b>	<b>3.9</b>
2011 Travel & Tourism Competitiveness Index.....	77	3.9
2009 Travel & Tourism Competitiveness Index.....	72	3.9
<b>T&amp;T regulatory framework .....</b>	<b>101</b>	<b>4.1</b>
Policy rules and regulations .....	56	4.6
Environmental sustainability .....	97	4.3
Safety and security.....	115	3.8
Health and hygiene.....	100	3.6
Prioritization of Travel & Tourism .....	88	4.2
<b>Business environment and infrastructure .....</b>	<b>103</b>	<b>3.1</b>
Air transport infrastructure .....	73	2.9
Ground transport infrastructure.....	131	2.6
Tourism infrastructure .....	93	2.8
ICT infrastructure .....	77	2.9
Price competitiveness in the T&T industry .....	105	4.2
<b>T&amp;T human, cultural, and natural resources.....</b>	<b>34</b>	<b>4.5</b>
Human resources .....	72	4.9
Education and training.....	70	4.7
Availability of qualified labor.....	63	5.1
Affinity for Travel & Tourism .....	86	4.5
Natural resources .....	16	5.1
Cultural resources.....	37	3.5



**Note:** For further details and explanation, please refer to the section "How to Read the Country/Economy Profiles" on page 83.