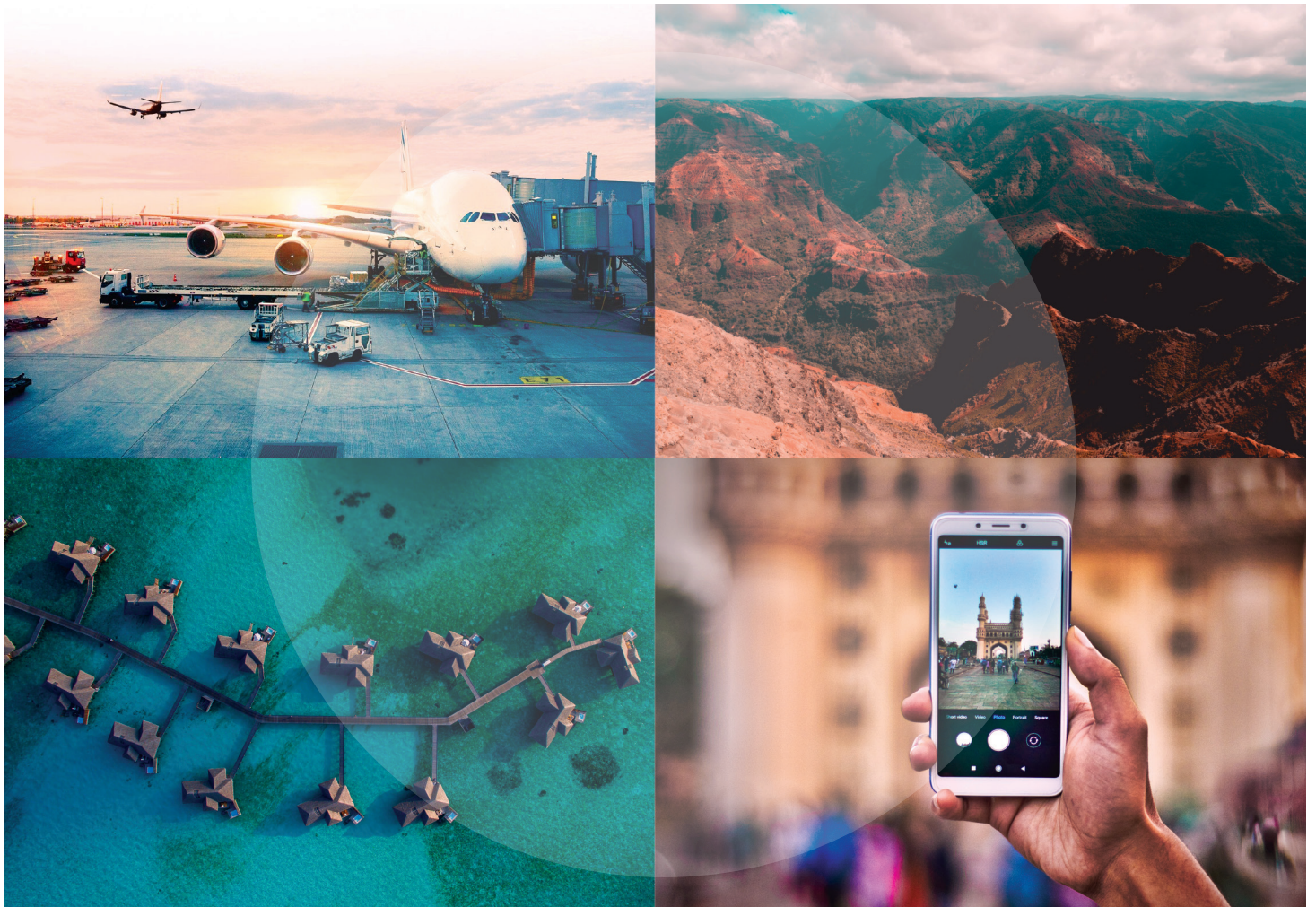Insight Report

The Travel & Tourism Competitiveness Report 2019

Travel and Tourism at a Tipping Point

Insight Report

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Travel and Tourism at a Tipping Point

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Preface

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In 2018, according to the World Tourism Organization, the number of international tourist arrivals worldwide reached 1.4 billion, two years before it was predicted to do so. That year also marked the seventh year in a row where the growth in tourism exports (+4%) exceeded the growth in merchandise exports (+3%). Given this rapid pace of growth, the prediction that international arrivals will reach 1.8 billion by 2030 may be conservative.

This presents enormous potential for the sector and economies globally as travel is further democratized. Emerging economies are contributing larger proportions of travellers to this global trend and are becoming increasingly desirable as destinations as they show greater competitiveness in travel and tourism.

It is also since the previous publication of our biennial *Travel & Tourism Competitiveness Report* in April 2017, that the term "overtourism" has become common currency. Used to depict the negative impact tourism can have on a destination, its residents and visitors alike, and often the result of congestion and overcrowding from poor tourism management, "overtourism" can be considered the outcome of destinations exceeding their tourism carrying capacity. Tourism carrying capacity is defined by the World Tourism Organisation (UNWTO) as "the maximum number of people that may visit a tourist destination at the same time, without causing destruction of the physical, economic, and sociocultural environment and an unacceptable decrease in the quality of visitors' satisfaction."

It is within this context of enormous growth potential, and increasing pressure on tourism infrastructure and services, that travel & tourism competitiveness can be seen simultaneously as a powerful economic growth driver, or a risk to ongoing development of the industry if not managed correctly.

Growth in T&T competitiveness has traditionally offered tremendous returns, from increases to GDP and labour absorption, to local economic development for more remote communities. However, competitiveness for competitiveness sake may become a burgeoning constraint on the sector as a whole. For this reason, the theme of this year's edition of the *Travel & Tourism Competitiveness Report 2019* is "Travel and Tourism at a Tipping Point".

The *Travel & Tourism Competitiveness Report* is a flagship product of the Platform for Shaping the Future of Mobility, which brings together world leaders to ensure travel and transportation systems meet 21st century demands. The rapid proliferation of new modes of mobility and disruptive business models provides us with the opportunity to reinvent mobility systems by using policy and technological innovations to address societal, economic and environmental risks. This report provides a valuable tool for policy-makers, companies and complementary sectors to understand and anticipate emerging trends and risks in global travel and tourism, adapt their policies and practices, and accelerate new models that ensure the longevity of this important sector. This combination allows stakeholders to combine insight and action into accelerating change, and we invite leaders to engage with our platform.

Executive Summary

The 2019 edition of the *Travel & Tourism Competitiveness Report* features the latest iteration of the Travel & Tourism Competitiveness Index (TTCI). Published biennially, the TTCI benchmarks the T&T competitiveness of 140 economies and measures "the set of factors and policies that enable the sustainable development of the Travel & Tourism (T&T) sector, which in turn, contributes to the development and competitiveness of a country."

The *Travel & Tourism Competitiveness Report* is a flagship product of the World Economic Forum's Platform for Shaping the Future of Mobility, which brings together world leaders to ensure travel and transportation systems meet 21st century demands. This report serves as a strategic benchmarking tool for policy-makers, companies and complementary sectors to advance the future development of the T&T sector by providing unique insight into the strengths and development areas of each country/economy to enhance industry competitiveness. Further, it serves as a platform for multistakeholder dialogue to understand and anticipate emerging trends and risks in global travel and tourism, adapt their policies, practices and investment decisions, and accelerate new models that ensure the longevity of this important sector. The index is comprised of four subindexes, 14 pillars and 90 individual indicators, distributed among the different pillars.

Published under the theme of "Travel and Tourism at a Tipping Point", the report's results demonstrate the healthy growth of the industry, with increased competitiveness worldwide set against the slower improvement and adoption rates of necessary infrastructure and sustainable tourism management practices respectively. An analysis of country/economy and regional performance at a granular level provides interested and responsible stakeholders with an integrated understanding of gaps and opportunities for not only driving competitiveness, but ensuring that the right policies, infrastructure and management systems are in place for welcoming the tourism demand that such competitiveness will activate—while preserving the tourism assets, both natural and cultural, that the industry depends upon.

Results Overview

As has been an ongoing trend over the last four years, T&T competitiveness continues to improve worldwide, and connectivity enabling—and enabled by—the industry remains on an upward path. The TTCI 2019 results show that air transportation, digital connectivity and international openness are advancing in a global context of growing trade tensions and nationalism. Air transport infrastructure improvements show a noticeable increase on route capacity and the number of airlines providing services in individual countries. International openness is progressing, with lower-income economies leading the way. Digital connectivity has been bolstered by a growing number of individuals using the internet and mobile internet subscriptions, meaning more economies are now in a position to leverage the growing list of digital T&T services. Travel has also become, for the most part, less expensive and safer, with the Price Competitiveness pillar, for example, showing the greatest percentage increase since 2017. Lastly, T&T is increasingly being prioritized by stakeholders around the world as measured by more favourable perceptions of government prioritization, increased industry funding and more effective marketing campaigns.

On the other hand, results also show that future demand for transportation services, especially regarding aviation, might outpace improvements in infrastructure capacity. More work also needs to be done to make sure cultural and natural assets are preserved in the face of growing tourism visits. While more environmental treaty ratifications and improvements to global average perceptions of the sustainability of T&T are encouraging signs, the continued rise in deforestation, air pollution and species endangerments point to potential gaps between policy and enforcement.

Key Movers

The top 10 TTCI scorers remain the same. Spain is the top performer for the third consecutive report, while the United Kingdom's slight decline in competitiveness has led to it being overtaken by the United States. The top 10 are, from highest to lowest score: Spain, France, Germany, Japan, the United States, the United Kingdom, Australia, Italy, Canada and Switzerland. India (40th to 34th) had the greatest improvement over 2017 among the top 25% of all countries ranked in the report. Egypt (74th to 65th) had the best improvement among countries ranked 36 to 70, Serbia (95th to 83rd) had the largest improvement for economies ranked 71st to 105th and Bangladesh (125th to 120th) was the most improved among the remaining 25% of scorers.

Regional Results

Europe and Eurasia remains the most competitive region when it comes to T&T. The region is home to six of the top 10 scoring economies. It has some of the best cultural resources in the world and leading infrastructure, especially for ground, port and tourist service infrastructure. The region also has the world's best enabling environment and T&T prioritization. Despite its maturity, the region was also the most improved region since 2017, with the greatest average improvement resulting from price competitiveness, air transport infrastructure and ICT readiness. While Western, Southern and Northern Europe remain the competitive core of the region, the Balkans and Eastern Europe and Eurasia subregions showed the highest average TTCI score growth.

Asia-Pacific is the second-most competitive region in terms of T&T. Japan (4th) leads the region in overall score, while Bangladesh (120th) had the greatest improvement. The region boasts the best combination of natural and cultural resources, including the highest regional performance for the Cultural Resources and Business Travel subindex. Asia-Pacific boasts the world's most impressive air transport infrastructure and is clearly investing in its ground, port and tourist service infrastructure, in which it showed the greatest regional improvement. Eastern Asia-Pacific remains by far the most competitive *subregion* in Asia-Pacific, while South Asia is the most improved since 2017.

The Americas is the third-highest scoring region on the TTCI, with the United States holding its position as the region's top scoring economy and Bolivia (99th to 90th) showing the most improvement. Countries in the Americas often rely on their natural assets to generate tourism but are often challenged by lower scores for enabling environments. In particular, the region suffers from the lowest average scores for business environment and safety and security, with the latter mostly due to crime rates. The Americas improved most on ICT readiness and price competitiveness, with South America leading in overall TTCI growth.

The Middle East and North Africa has the third-best improvement in average TTCI scores since 2017. The United Arab Emirates (33rd) is the only regional economy to make it into the top 25%, while Egypt (65th) is the most improved since the last edition of the index. The more developed Arab Gulf States and Israel (57th) score well for enabling environment and infrastructure pillars, while North Africa does better on natural and cultural resources. Overall, the region is very price competitive, but has challenges with terrorism-related safety and security and international openness. These might be just some of the underlying reasons why the region scores lowest for the Natural and Cultural Resources subindex.

Sub-Saharan Africa outpaces the global average for growth in tourism receipts and arrivals, with the island nation of Mauritius (54th) outscoring last year's top performer South Africa (61st) to rank as top scorer in the region. Due to historically lower levels of economic development, the region continues to face difficulties in health and hygiene, overall infrastructure and the effective selling of cultural and business travel. In the face of this, however, Sub-Sharan Africa shows great untapped potential for natural tourism, which can be better utilized with more development and investment. Some of the region's greatest improvements came from areas where it traditionally has trailed, including ICT readiness, international openness and price competitiveness. Lesotho (128th to 124th) had the greatest growth in score since 2017; however, it was the average growth in the economies of Western Africa that generated the most subregional improvement.

About the Travel & Tourism Competitiveness Report 2019

The 2019 edition of the *Travel & Tourism Competitiveness Report* features the latest iteration of the Travel & Tourism Competitiveness Index (TTCI). Published biennially, the TTCI benchmarks the T&T competitiveness of 140 economies and measures "the set of factors and policies that enable the sustainable development of the Travel & Tourism (T&T) sector, which in turn, contributes to the development and competitiveness of a country." For complete performance results of the 2019 TTCI, see parts 1 and 2 of this report as well as the At-a-Glance rankings table on page xiii.

The index has been developed in the context of the World Economic Forum's Industry Programme for Aviation, Travel and Tourism, as part of the Platform for Shaping the Future of Mobility. It is undertaken in close collaboration with our data partners Bloom Consulting, STR Global, 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).

Benchmarking T&T Competitiveness

The report provides a strategic benchmarking tool for business and governments to develop the T&T sector. By allowing cross-country comparison and benchmarking countries' progress on the drivers of T&T competitiveness, it informs policies and investment decisions related to T&T business and industry development. The report provides unique insight into the strengths and areas for development of each country to enhance its industry competitiveness, and a platform for multistakeholder dialogue at the country-level to formulate appropriate policies and actions.

It is comprised of four subindexes, 14 pillars and 90 individual indicators, distributed among the different pillars.

The T&T Competitiveness Index 2019 framework

Travel & Tourism Competitiveness Index			
Enabling Environment	**T&T Policy and Enabling Conditions**	**Infrastructure**	**Natural and Cultural Resources**
Business Environment	Prioritization of Travel & Tourism	Air Transport Infrastructure	Natural Resources
Safety and Security	International Openness	Ground and Port Infrastructure	Cultural Resources and Business Travel
Health and Hygiene	Price Competitiveness	Tourist Service Infrastructure	
Human Resources and Labour Market	Environmental Sustainability		
ICT Readiness			

Travel & Tourism Competitiveness Index

The **Enabling Environment** subindex captures the general conditions necessary for operating in a country and includes 5 pillars:

1. **Business Environment (12 indicators):** This pillar captures the extent to which a country has in place a policy environment conducive for companies to do business. Research has found significant links between economic growth and aspects such as how well property rights are protected and the efficiency of the legal framework. Similarly, distortions in taxation and competition policy—including both domestic and international competition, measured in terms of foreign direct investment (FDI) facilitation—impact the efficiency and productivity of a country. These factors are important for all sectors, including T&T. In addition, we consider the cost and time necessary to deal with construction permits, which is a particularly relevant issue for T&T development.

2. **Safety and Security (5 indicators):** Safety and security are critical factors determining the competitiveness of a country's T&T industry. Tourists are likely to be deterred from travelling 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.

3. **Health and Hygiene (6 indicators):** Health and hygiene is also essential for T&T competitiveness. Access to improved drinking water and sanitation is important for the comfort and health of travellers. 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. In addition, high prevalence of HIV and malaria can have an impact on the productivity of the T&T labour force and play a role in discouraging tourists from visiting a country.

4. **Human Resources and Labour Market (9 indicators):** High-quality human resources in an economy ensure that the industry has access to the collaborators it needs. The components of this pillar measure how well countries develop skills through education and training and enhance the best allocation of those skills through an efficient labour market. The former includes formal educational attainment rates and private sector involvement in upgrading human resources, such as business investment in training services and customer care. The latter includes measures of the flexibility, efficiency and openness of the labour market, and the participation of women, to assess the depth of the country's talent pool and its ability to allocate human resources to their best use.

5. **ICT Readiness (8 indicators):** Online services and business operations have increasing importance in T&T, with the internet being used for planning itineraries and booking travel and accommodation. However, ICT is now so pervasive and important for all sectors, it is considered part of the general enabling environment. The components of this pillar measure not only the existence of modern hard infrastructure (i.e. mobile network coverage and quality of electricity supply), but also the capacity of businesses and individuals to use and provide online services.

The **T&T Policy and Enabling Conditions** subindex captures specific policies or strategic aspects that impact the T&T industry more directly and includes 4 pillars:

6. **Prioritization of Travel and Tourism (6 indicators):** The extent to which the government prioritizes the T&T sector has an important impact on T&T competitiveness. By making clear that the sector is of primary concern, the government can channel funds to essential development projects and coordinate the actors and resources necessary to develop the sector. Signalling the stability of government policy can affect the sector's ability to attract further private investment. The government can also play an important role in directly attracting tourists through national marketing campaigns. This pillar includes measures of government spending, effectiveness of marketing campaigns and country branding, and the completeness and timeliness of providing T&T data to international organizations, as this indicates the importance that a country assigns to its T&T sector.

7. **International Openness (3 indicators):** Developing a competitive T&T sector internationally requires a certain degree of openness and travel facilitation. Restrictive policies such as cumbersome visa requirements diminish tourists' willingness to visit a country, and indirectly reduce the availability of key services. Components measured in this pillar include the openness of the bilateral air service agreements which the government has entered, which impacts the availability of air connections to the country, and the number of regional trade agreements in force, which proxies the extent to which it is possible to provide world class tourism services.

8. **Price Competitiveness (4 indicators):** Lower costs related to travel in a country increase its attractiveness for many travellers as well as for investing in the T&T sector. Among the aspects of price competitiveness taken into account in this pillar are airfare ticket taxes and airport charges, which can make flight tickets much more expensive; the relative cost of hotel accommodation; the cost of living, proxied by purchasing power parity; and fuel price costs, which directly influence the cost of travel.

9. **Environmental Sustainability (10 indicators):** The importance of the natural environment for providing an attractive location for tourism cannot be overstated, so policies and factors enhancing environmental sustainability are an important competitive advantage in ensuring a country's future attractiveness as a destination. This pillar consists of policy indicators such as the stringency and enforcement of the government's environmental regulations and variables assessing the status of water, forest resources and marine life, proxied by fish stock status. Given the environmental impacts of tourism itself, we also take into account the extent to which the T&T industry is developed in a sustainable manner.

The **Infrastructure** subindex captures the availability and quality of physical infrastructure of each economy and includes 3 pillars:

10. **Air Transport Infrastructure (6 indicators):** Air connectivity is essential for travellers' ease of access to and from countries, as well as movement within many countries. In this pillar we measure the quantity of air transport, using indicators such as available seat kilometres, the number of departures, airport density and the number of operating airlines, as well as the quality of air transport infrastructure for domestic and international flights.

11. **Ground and Port Infrastructure (7 indicators):** The availability of efficient and accessible transportation to key business centres and tourist attractions is vital for the T&T sector. This requires a sufficiently extensive road and railroad network, proxied by road and railroad densities, as wells as roads, railroads, and ports infrastructure that meet international standards of comfort, security and modal efficiency. The pillar also accounts for unpaved roads, which enable local connections, and to some extent, can proxy the existence of picturesque roads, which can, in very specific contexts, attract tourists.

12. **Tourist Service Infrastructure (4 indicators):** The availability of sufficient quality accommodation, resorts and entertainment facilities can represent a significant competitive advantage for a country. We measure the level of tourism service infrastructure through the number of hotel rooms complemented by the extent of access to services such as car rentals and ATMs.

The **Natural and Cultural Resources** subindex captures the principal "reasons to travel" and includes 2 pillars:

13. **Natural Resources (5 indicators):** Countries with natural assets clearly have a competitive advantage in attracting tourists. In this pillar we include a number of attractiveness measures, including the number of UNESCO natural World Heritage sites, a measure of the quality of the natural environment which proxies the beauty of its landscape, the richness of the fauna in the country as measured by the total known species of animals, and the percentage of nationally protected areas, which proxies the extent of national parks and nature reserves.

14. **Cultural Resources and Business Travel (5 indicators):** A country's cultural resources are another critical driver of T&T competitiveness. In this pillar we include the number of UNESCO cultural World Heritage sites, the number of large stadiums that can host significant sport or entertainment events, and a new measure of digital demand for cultural and entertainment—the number of online searches related to a country's cultural resources can allow the level of interest to be inferred. The number of international association meetings taking place in a country is included to capture, at least partially, business travel.

Data and Methodology

Two-thirds of the dataset for the TTCI is statistical data from international organizations, with the remaining third based on survey data from the World Economic Forum's annual Executive Opinion Survey, which is used to measure concepts that are qualitative in nature or for which internationally comparable statistics are not available for enough countries. Carried out among over 16,000 business executives and business leaders annually in all the economies included in our assessment, the survey represents a unique source of insight into critical qualitative aspects of T&T competitiveness. For more details about the survey please see Appendix B of the *The Global Competitiveness Report 2018* (http://reports. weforum.org/global-competitiveness-report-2018/).

The sources of statistical data include, but are not limited to, Bloom Consulting, STR, IATA, ICCA, ILO, ITU, IUCN, UNESCO, UN Statistics Division, UNAIDS, UNWTO, WHO, World Bank, World Resources Institute, World Road Statistics, CIA World Factbook, WTO, WTTC, WDPA, Yale-CIESIN Environmental Performance Index. The overall TTCI score is computed through successive aggregations of scores, from the indicator level (i.e. the lowest, most disaggregated level) through the pillar and subindex levels, using a simple average (i.e. arithmetic mean) to combine the components. Scores on each indicator are first normalized onto a common scale. For more details please see Appendices B and C of this report.

Data Presentation

The TTCI is accompanied by an extensive data section covering regional and textual analyses that can be accessed online. The published report features Regional Dashboards and Analysis for five regions: The Americas, Asia-Pacific, Europe and Eurasia, Middle East and North Africa, and Sub-Saharan Africa. These provide insight into the regional performance against the 14 pillars, as well as distribution of T&T GDP, T&T employment and international arrivals across the region's sub-regions. In addition, data tables reporting global rankings and scores for each of the pillars provide an overview of the global situation of the most relevant T&T measures available.

Visit http://reports.weforum.org/ttcr to view and download the entire report, including interactive scorecards and rankings, as well as individual profiles for each of the 140 economies covered by the TTCI. These profiles provide a complete snapshot of a country's performance on all the components of the TTCI, including the 90 individual indicators as well as additional key indicators, to offer a complete picture of a country's T&T's sector.

Country Coverage

Eight new economies included in the current edition were not analysed in the previous report: Angola, Brunei Darussalam, Burkina Faso, Eswatini, Guinea, Haiti, Liberia and Seychelles. Four that were covered in the last report— Barbados, Bhutan, Gabon and Madagascar— are not covered this time because of insufficient data. The 140 economies covered this year account for approximately 98% of world T&T GDP. Please see Appendix D for economy classification by region and income group determined by the World Economic Forum and World Bank.

T&T Competitiveness Index 2019 Overall Rankings

Covering 140 economies, the Travel & Tourism Competitiveness Index measures the set of factors and policies that enable the sustainable development of the travel and tourism sector, which contributes to the development and competitiveness of a country.

Rank	Economy	Score¹	Change since 2017 Rank	Change since 2017 Score²	Diff. from Global Avg. (%)
1	Spain	5.4	0	0.3	41.4
2	France	5.4	0	1.5	40.4
3	Germany	5.4	0	2.0	40.0
4	Japan	5.4	0	2.1	39.6
5	United States	5.3	1	2.6	36.6
6	United Kingdom	5.2	−1	−0.2	34.9
7	Australia	5.1	0	0.8	33.6
8	Italy	5.1	0	1.9	32.2
9	Canada	5.1	0	1.6	31.3
10	Switzerland	5.0	0	1.5	30.4
11	Austria	5.0	1	2.0	28.8
12	Portugal	4.9	2	3.2	27.2
13	China	4.9	2	3.2	26.7
14	Hong Kong SAR	4.8	−3	−1.1	25.1
15	Netherlands	4.8	2	3.2	24.5
16	Korea, Rep.	4.8	3	4.7	24.3
17	Singapore	4.8	−4	−2.0	23.7
18	New Zealand	4.7	−2	1.4	23.4
19	Mexico	4.7	3	3.4	21.9
20	Norway	4.6	−2	−1.0	19.4
21	Denmark	4.6	10	3.4	19.1
22	Sweden	4.6	−2	0.2	18.6
23	Luxembourg	4.6	5	1.4	18.4
24	Belgium	4.5	−3	0.1	18.2
25	Greece	4.5	−1	0.9	18.1
26	Ireland	4.5	−3	0.3	18.0
27	Croatia	4.5	5	2.4	17.6
28	Finland	4.5	5	2.7	17.4
29	Malaysia	4.5	−3	0.4	17.3
30	Iceland	4.5	−5	0.0	17.0
31	Thailand	4.5	3	2.6	16.9
32	Brazil	4.5	−5	−0.8	15.8
33	United Arab Emirates	4.4	−4	−1.3	15.3
34	India	4.4	6	5.7	14.9
35	Malta	4.4	1	2.4	13.3
36	Slovenia	4.3	5	3.9	13.0
37	Taiwan, China	4.3	−7	−3.0	12.6
38	Czech Republic	4.3	1	2.5	12.5
39	Russian Federation	4.3	4	4.0	12.2
40	Indonesia	4.3	2	2.8	11.0
41	Costa Rica	4.3	−3	1.0	10.9
42	Poland	4.2	4	2.9	10.0
43	Turkey	4.2	1	2.0	9.8
44	Cyprus	4.2	8	4.8	9.6
45	Bulgaria	4.2	0	1.8	9.5
46	Estonia	4.2	−9	−0.7	9.1
47	Panama	4.2	−12	−4.0	9.0
48	Hungary	4.2	1	3.4	9.0
49	Peru	4.2	2	3.1	8.3
50	Argentina	4.2	0	2.5	7.9
51	Qatar	4.1	−4	1.5	7.5
52	Chile	4.1	−4	0.9	6.6
53	Latvia	4.0	1	1.8	5.0
54	Mauritius	4.0	1	2.3	4.2
55	Colombia	4.0	7	4.7	4.2
56	Romania	4.0	12	5.7	3.7
57	Israel	4.0	4	3.6	3.5
58	Oman	4.0	8	5.1	3.4
59	Lithuania	4.0	−3	1.5	3.3
60	Slovak Republic	4.0	−1	2.0	3.3
61	South Africa	4.0	−8	−0.8	3.2
62	Seychelles	3.9	n/a	n/a	2.1
63	Viet Nam	3.9	4	3.4	1.7
64	Bahrain	3.9	−4	0.4	1.5
65	Egypt	3.9	9	7.0	1.3
66	Morocco	3.9	−1	2.2	1.2
67	Montenegro	3.9	5	5.6	1.1
68	Georgia	3.9	2	4.7	0.7
69	Saudi Arabia	3.9	−6	1.4	0.7
70	Ecuador	3.9	−13	−1.2	0.4
71	Azerbaijan	3.8	0	2.7	−1.3
72	Brunei Darussalam	3.8	n/a	n/a	−1.7
73	Dominican Republic	3.8	3	4.2	−1.9
74	Uruguay	3.8	3	4.2	−2.1
75	Philippines	3.8	4	4.2	−2.5
76	Jamaica	3.7	−7	0.9	−2.6
77	Sri Lanka	3.7	−13	−2.3	−3.2
78	Ukraine	3.7	10	6.5	−3.2
79	Armenia	3.7	5	5.2	−3.6
80	Kazakhstan	3.7	1	2.2	−4.6
81	Namibia	3.7	1	2.2	−4.7
82	Kenya	3.6	−2	1.0	−5.7
83	Serbia	3.6	12	7.2	−5.7
84	Jordan	3.6	−9	−1.2	−6.7
85	Tunisia	3.6	2	2.4	−6.8
86	Albania	3.6	12	6.9	−6.8
87	Trinidad and Tobago	3.6	−14	−2.4	−6.9
88	Cape Verde	3.6	−5	0.0	−7.7
89	Iran, Islamic Rep.	3.5	4	3.4	−7.9
90	Bolivia	3.5	9	4.7	−9.1
91	Nicaragua	3.5	1	1.6	−9.2
92	Botswana	3.5	−7	−1.2	−9.6
93	Mongolia	3.5	9	4.8	−9.8
94	Honduras	3.5	−4	−0.9	−10.2
95	Tanzania	3.4	−4	−0.5	−10.8
96	Kuwait	3.4	4	2.7	−11.1
97	Lao PDR	3.4	−3	0.4	−11.2
98	Cambodia	3.4	3	2.4	−11.8
99	Guatemala	3.4	−13	−3.2	−11.8
100	Lebanon	3.4	−4	0.3	−12.1
101	North Macedonia	3.4	−12	−3.8	−12.7
102	Nepal	3.3	1	1.9	−13.0
103	Moldova	3.3	14	6.4	−14.5
104	Tajikistan	3.3	3	3.1	−14.6
105	Bosnia and Herzegovina	3.3	8	5.2	−14.7
106	Senegal	3.3	5	3.8	−15.2
107	Rwanda	3.2	−10	−3.4	−15.5
108	El Salvador	3.2	−3	−1.3	−16.0
109	Paraguay	3.2	1	2.7	−16.0
110	Kyrgyz Republic	3.2	5	4.1	−16.0
111	Gambia, The	3.2	1	3.4	−16.1
112	Uganda	3.2	−6	−0.3	−17.0
113	Zambia	3.2	−5	−0.6	−17.8
114	Zimbabwe	3.2	0	1.2	−18.0
115	Ghana	3.1	5	3.5	−18.2
116	Algeria	3.1	2	2.5	−18.2
117	Venezuela	3.1	−13	−4.6	−18.6
118	Eswatini	3.1	n/a	n/a	−18.8
119	Côte d'Ivoire	3.1	−10	−1.6	−19.1
120	Bangladesh	3.1	5	7.3	−19.4
121	Pakistan	3.1	3	7.1	−19.5
122	Ethiopia	3.0	−6	−2.4	−21.4
123	Benin	3.0	4	6.3	−21.5
124	Lesotho	3.0	4	6.4	−21.5
125	Malawi	2.9	−2	0.7	−23.9
126	Guinea	2.9	n/a	n/a	−24.1
127	Mozambique	2.9	−5	0.0	−24.3
128	Cameroon	2.9	−2	0.7	−24.7
129	Nigeria	2.9	0	0.0	−26.8
130	Mali	2.8	0	0.8	−27.1
131	Sierra Leone	2.8	0	3.4	−27.6
132	Burkina Faso	2.8	n/a	n/a	−27.7
133	Haiti	2.8	n/a	n/a	−28.2
134	Angola	2.7	n/a	n/a	−28.9
135	Mauritania	2.7	−3	1.8	−30.2
136	Congo, Dem. Rep.	2.7	−3	1.4	−30.5
137	Burundi	2.7	−3	3.7	−30.9
138	Liberia	2.6	n/a	n/a	−32.2
139	Chad	2.5	−4	0.0	−34.4
140	Yemen	2.4	−4	−0.9	−37.2

● Asia-Pacific ● Europe and Eurasia ● The Americas ● Middle East and North Africa ● Sub-Saharan Africa

¹ Overall scores range from 1 to 7 where 1 = worst and 7 = best.
² Change in score is displayed as a percentage.

Part 1

The Travel & Tourism Competitiveness Index 2019

The Travel & Tourism Competitiveness Index 2019

Travel & Tourism at a Tipping Point

The travel & tourism (T&T) industry plays a vital role in the global economy and community. In 2018, the industry helped generate 10.4% of world GDP and a similar share of employment, and has shown enormous resilience over the last decade. Fueling this expansion and relative resilience is the ongoing growth of the middle-class in Asia and other parts of the world. In the coming decade, industry contribution to GDP is expected to rise by nearly 50%.[1] In light of this expansion, policy-makers, industry leaders and other stakeholders will have to pay closer attention to T&T competitiveness to capture this growing market. While government and business actors alike will need to consider what competitiveness levers they can activate to retain or gain market share, special consideration needs to be given to sustaining tourism infrastructure, services and assets. As numbers of business and leisure travelers increase the world over, improvements in competitiveness will need to be undertaken alongside careful planning for tourism management and carrying capacity of destinations. The results of the TTCI serve as a tool for policy-makers, T&T businesses and other stakeholders to understand and advance the necessary dialogues and actions that will ensure the longevity of this critical sector.

The 2019 Travel & Tourism Competitiveness Index (TTCI) assesses 140 economies for T&T competitiveness in four subindexes: Enabling Environment, T&T Policy and Enabling Conditions, Infrastructure, and Natural and Cultural Resources (see *About the Travel & Tourism Competitiveness Index 2019* for more details). The economies covered by the index account for nearly 98% of global direct T&T GDP and a similar proportion of international tourist arrivals.[2] In this section we discuss what it takes to be competitive in T&T and the implications for longer-term economic development and longevity of the industry. The second section, *2019 Results and Analysis,* presents overall results for the 2019 TTCI, along with analysis of ranking quartile groups. While there is some country/economy and regional analysis in Part 1, more in-depth regional analyses, including data analysis and tables, are presented in Part 2. Further TTCI information can also be accessed by visiting the *Travel & Tourism Competitiveness Report 2019* online (http://reports.weforum.org/ttcr).

T&T competitiveness requires a holistic approach

The TTCI is deliberately designed to reflect and measure the diversity of factors that influence a country's ability to compete globally in travel and tourism. Each of the 14 pillars that make up the index, if addressed with appropriate policy-making and sufficient investment, has the potential to drive competitiveness and returns in tourism arrivals and receipts.

What is explored to a lesser degree is the nuanced interdependence of the pillars and their combined impact on the longer-term sustainability of the industry. The results of this year's report present an opportunity to explore this in more detail. At the outset, the data suggests that a holistic, systems-led approach to tourism strategy is required to truly perform successfully on the global rankings. In particular, economies need to achieve a strong performance on all of the pillars to rise to the top of the index. Typically, the highest-scoring economies tend to beat global averages on the majority of the pillars, while the opposite is true for the bottom-scoring economies. Only Mexico, Brazil and India have been able to rank among the top 25% of ranked economies on the TTCI by outperforming the global average in as little as seven of the 14 pillars. These economies have exceptional natural and cultural resources, which they combine effectively with relatively strong price competitiveness.

Yet even depending on a smaller number of pillars, such as Natural Resources, still requires a systems-led approach. The assets that this pillar measures cannot be bought or created, but if not managed well can be destroyed rapidly. The ability to generate demand and derive value from them relies heavily on the ability to set and enforce environmental policies (measured in the Environmental Sustainability pillar) , as well as the ability to effectively manage their "consumption". If adequate focus is not given to preserving these assets, they will, as with any depleted resource, cease to contribute to the overall competitiveness performance of the country.

Other interdependencies are equally clear. Developed infrastructure and international openness are required to boost connectivity of destinations, which allows for a greater number of travellers to visit. A favourable business environment makes it easier for T&T businesses to operate in a country, while a skilled workforce leads to better customer service, productivity and capability to leverage increasingly vital communication and technology tools. Concerns over

**Box 1: Global Health Security and T&T:
A Case for Cross-Industry Collaboration**
The number and kind of infectious disease outbreaks (e.g. influenza, Ebola, Zika, SARS, MERS-CoV, antibiotic resistant bacteria, etc.) have increased significantly over the past 30 years and, as global trade and travel increase, the international spread of disease is expected to grow. In today's globalized world, a pathogen can travel from a remote village to major cities on all continents in under 36 hours, but unjustified or ineffective restrictions on travel or trade during outbreaks can have a massive economic impact on affected countries.

For example, efforts by countries to ban flights from nations with H1N1 outbreaks in 2009 were ultimately revealed to be ineffective in containing the virus; and the estimated loss associated with the H1N1 outbreak for the Mexican tourism industry was $5 billion. Similarly, between 2002 and 2004, as a result of Severe Acute Respiratory Syndrome (SARS), Hong Kong saw a 41% reduction in tourism GDP, Singapore 43% and China a 25% reduction as well as a loss of 2.8 million jobs.

The World Economic Forum convenes experts from international health organizations and travel and tourism business leaders to mitigate the impact of outbreaks on the industry and subsequently on national GDPs through its **Epidemics Readiness Accelerator (ERA).** Together, efforts are underway to improve decision-making, coordination and communications within and between both the public and private sectors, relating to risk, travel advisories and border measures.

**Box 2: Protecting the Ocean Ecosystem:
A Case for Public-Private Collaboration**
Only 7% of the ocean is protected through Marine Protected Areas (MPAs). However, this figure varies based on the criteria used. Further, many MPAs are either only legally designated, poorly managed and enforced, or represent standalone efforts with little integration between them. Yet these 'national parks in the sea' should be seen as part of an economy's infrastructure, helping to ensure a sustainable tourism industry and a supply of food from the sea. Addressing this, and increasing levels of protection, is key to restoring ocean ecosystems while generating and safeguarding the businesses, communities, jobs and livelihoods that rely on healthy seas.

The **Friends of Ocean Action** brings together leaders from government, business, civil society, international organizations, science and technology to fast-track solutions to the most pressing challenges facing the ocean. One way to advance the health of ocean ecosystems is to promote the achievement of ambitious marine protection targets by driving concerted, public-private cooperation across geographies and sectors on the establishment of MPAs. The Friends of Ocean Action's efforts include: engaging in key relevant policy fora to support the international community in increasing global MPA coverage; partnering with key stakeholders to set-up and champion a game-changing new MPA platform and building a business case for MPAs that will mobilize a strong coalition of world business champions ready to contribute to reaching a new 30% MPA target by 2030.

healthcare, hygiene, safety and security conditions can also prove detrimental to generating T&T demand and investment, especially from abroad. Given the complexity and interconnectedness of these factors, it is impossible for industry corporations or tourism agencies to tackle these issues in isolation. They require cross-industry collaboration, public-private engagement and a better understanding of the global context beyond T&T. See Boxes 1 and 2 for real-world examples of such collaborations.

Strong T&T translates into overall economic development
Once economies begin performing well along a broad range of pillars—and in so doing begin to surpass the global average in T&T competitiveness—trends show that visitor numbers tend to climb considerably (Figure 1). However, because T&T competitiveness depends on aspects such as business conditions, strong labour markets, technology and infrastructure, less developed economies tend to lag their more advanced peers in overall scores. Because enabling conditions such as these are beneficial to economies on a whole, T&T stakeholders, both public

Figure 1: Travel & Tourism Competitiveness Index 2019 and international tourist arrivals

International tourist arrivals (millions)

TTCI 2019 score (1–7 scale)
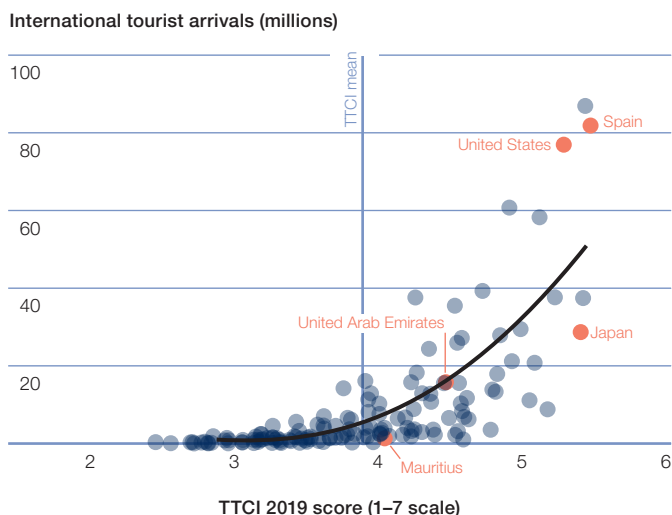
Note: International tourist arrivals excludes Liberia, (2017 or latest available). Top performers for each region are highlighted.
Sources: World Economic Forum and World Tourism Organization (UNWTO).

Figure 2: Correlation between TTCI pillars and international tourist arrivals, by income level

Correlation coefficient
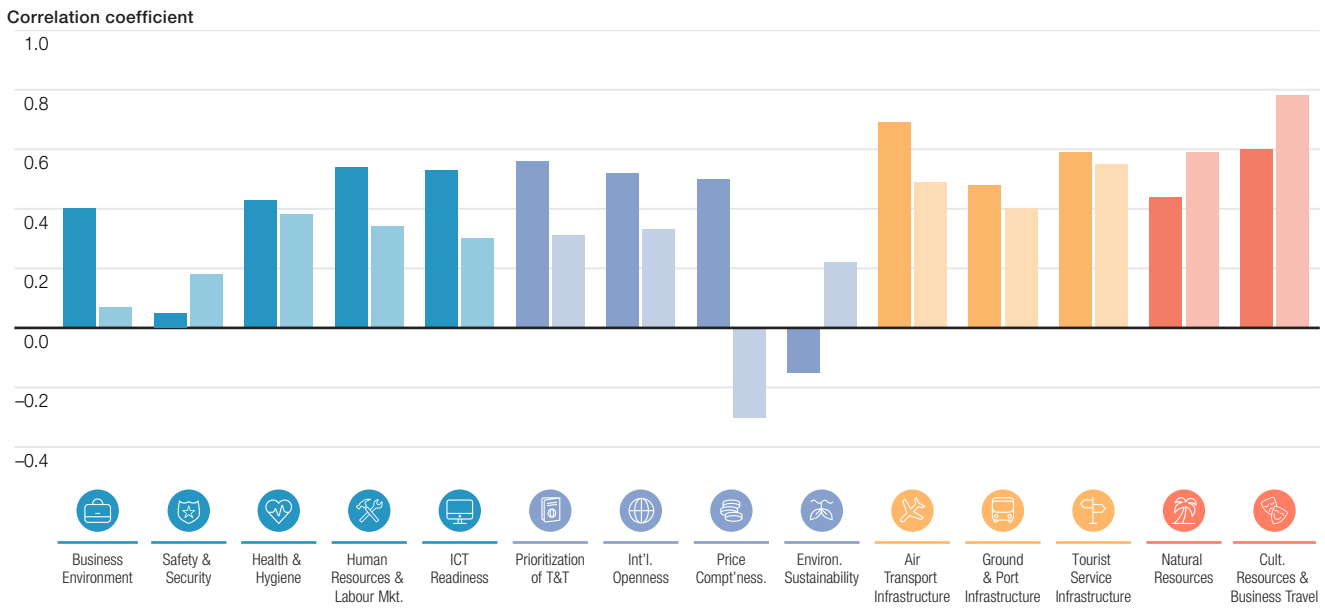
Notes: Light-coloured bars indicate high-income economies, dark-coloured bars indicate low- and lower-middle-income economies. Log of international tourist arrivals (2017 or latest available). Excludes arrivals for Liberia.

Sources: World Economic Forum and World Tourism Organization (UNWTO).

and private, can use this to justify investment in the sector as it has reinforcing effects on the economy overall.

The difference in average TTCI score for high-income economies and the average TTCI score for low to lower-middle income economies is approximately 38%. However, the average score between these economic groups within the Natural Resources pillar narrows to just below 11%. This is due to the obvious reason that natural assets are distributed among countries with varying economic conditions. Therefore, many lower-income economies that have an abundance of natural assets would do well to consider investing in efforts to drive economic development through the vehicle of a thriving travel and tourism sector, especially given that they may lack the foundations necessary to pursue other emerging economic pathways such as advanced manufacturing. An example from Africa is the marked increase in visa openness that is in large part a response to the need to drive T&T on the continent but has the obvious benefit of stimulating trade and development on a larger scale.[3]

Moreover, assets like natural and cultural resources, have the potential to attract capital investment; suggested by the correlation between T&T capital investment and Natural and Cultural Resources subindex scores, which is approximately 76%.

Figure 2 shows the correlation between TTCI pillars and international tourist arrivals for low to lower-middle income and high-income economies. From this data, it is clear that low to lower-middle income countries have a stronger relationship than their high-income counterparts do between arrivals and pillars such as Business Environment, Human Resources, ICT Readiness, International Openness and overall Infrastructure. This indicates that improving in these areas may have a more marked impact on T&T demand

for lower-income countries than for high-income ones. On the opposite end, Figure 2 also shows that more advanced countries are more likely to compete on natural and cultural resources, probably due to reduced differentiation for business environment, ICT readiness and other aspects associated with higher levels of economic development.

Favourable enabling environments and improved infrastructure that can be achieved through properly managed T&T-led development may translate into increased economic productivity and overall national competitiveness. Figure 3 (on page 6) shows the relationship between T&T competitiveness and the Global Competitiveness Index 4.0 (GCI 4.0), which measures the set of institutions, policies and factors that determine an economy's level of productivity. Because of shared foundations of competitiveness, there is a clear relationship between T&T and general competitiveness. Consequently, pursuing T&T competitiveness through such foundations can lead to a more productive economy, which in turn, may lead to reduced poverty levels, income and inequality.[4]

Anticipating the tipping point
The results of the 2019 TTCI that are presented and analyzed in the following section of Part 1 indicate that both developing and developed nations have advanced in competitiveness, with improved scores in areas such as price competitiveness, air transport infrastructure, ICT readiness, T&T prioritization and international openness. And as Figure 1 shows, T&T competitiveness does often lead to substantial increases in travel and tourism demand. Given the forecasted growth in T&T in the coming decade, understanding the consequences and impact of T&T competitiveness is important so that public and private stakeholders can together design pathways for sustainable management of the sector over time.

Figure 3: Correlation between travel & tourism and overall competitiveness

TTCI 2019 score (1–7 scale)

GCI 4.0 2018 score (0–100 scale)

Key
- High income
- Upper-middle income
- Lower-middle income
- Low income

Source: World Economic Forum, 2018 and 2019.

For example, developing nations may be exposed to surges in visitors that end up overwhelming local infrastructure, cause shortages in housing supply and degrade the very cultural and natural assets that attracted tourists in the first place. Thailand had to recently close down its famous Maya Bay cove after a rise in visitors caused extensive ecological damage.[5] More developed economies, even with robust and reliable, air, road and port and T&T infrastructure, may not adequately anticipate the impact that growing demand for travel could have. As a result, certain destinations may be ill prepared to deal with higher tourist numbers that are a result of their competitiveness. In Italy—which ranks 10th for tourist service infrastructure and 4th for natural and cultural resources—Venice has announced that it plans redirecting cruise ships away from the city's central islands, following public discontent.[6] Economies would be wise to begin paying more attention to the role that digital demand for natural and cultural tourism might play in our increasingly digital societies. For instance, the top 10 economies for cultural and entertainment digital demand account for a third of the tourist arrivals among economies in this year's rankings.[7] While this does not prove that increased digital demand necessarily leads to more arrivals, it does show that trends in online searches often mirror trends in numbers of visitors, especially on the upper end of the ranking. Thus, it is vital that policy-makers pay attention to these trends. Failure to adequately address issues related to rising tourism numbers has the potential to negatively impact future competitiveness, making nations victims of their own success. Therefore, more research and data will be required to measure when competitiveness leads to diminishing returns and to understand the feedback loops which may then drive down competitiveness. In the

meantime, strategies tied to dealing with rising tourism numbers are already being developed. For instance, the UNWTO provides potential strategies for sustainable tourism in urban environments, which include promoting time-based visitor dispersion, including during off-peak seasons, developing infrastructure with the needs of locals and tourists in mind, improving the monitoring of arrivals and setting up platforms for discussions with local residents.[8]

It is also imperative that countries balance their focus on T&T as one component of a diversified economic plan. While T&T is certainly a strong driver of economic development for a number of states, policy-makers and T&T businesses need to work hand in hand to make sure investment in T&T is shared with local communities and takes into account future needs of the industry. Creating an economy over-reliant on tourism that purely depends on natural and cultural resources and low-cost labour does not set a path for sustainable growth. The tourism industry of the future will be technology-driven and rely more on skilled workforces.[9] Decision-makers should take care to integrate efforts to drive T&T competitiveness within a holistic economic strategy that balances the near-term economic promises of the rapidly growing travel and tourism sector with consideration for the long-term resilience of its resources: human, natural and cultural.

2019 Results and Analysis

Global results

Despite trade tensions and nationalism crowding the news, global connectivity continues to advance, at least when it comes to T&T. Enhanced air transport infrastructure, higher ICT readiness scores and improved international openness all contribute to an industry that promotes, and takes advantage of, the desire of modern citizens to engage and exchange culturally, economically and academically. The TTCI 2019 results show that out of the 132 economies covered in both the 2019 and 2017 editions, 101 improved their score. While mature, high-income economies continue to score higher on average, middle-income countries showed the greatest improvement in competitiveness, with the subregions of Eurasia, the Balkans and Eastern Europe, South Asia and North Africa accounting for the greatest changes. Despite these differences, steady improvement across the board was observed. Across a broad range of economies, income segments and regions, improved competitiveness can be attributed primarily to performance on the following six pillars (a) Air Transport Infrastructure (b) ICT Readiness (c) Price Competitiveness, (d) International Openness (e) T&T Prioritization and (f) Safety and Security.

Cheaper travel for all

A significant part of the recent progress in T&T competitiveness has come from enhanced air transport infrastructure. Air Transport Infrastructure was the second-most improved pillar in the index thanks to increased airline service offerings in the majority of countries, and rising route capacity across the global network. Between 2015 and 2018, scheduled available seat kilometres increased by nearly 30% for economies ranked in both the 2017 and 2019

report editions. Moreover, flying and travel in general has been made more affordable thanks to lower global fuel prices and reduced ticket taxes and airport charges. In line with these trends and the further democratization of travel, Price Competitiveness (pillar 8) has seen the most measurable improvement of all the pillars over the last two years.

Destinations going digital

Higher scores in ICT readiness indicate that technology-enabled connectivity continues to proliferate. ICT readiness results have been bolstered by the rising number of individuals using the internet and mobile internet subscriptions—a reminder of how important mobile service offerings will become for the T&T sector in the next few years. On average, the number of mobile broadband internet subscriptions per 100 people has climbed by more than one-quarter since the 2017 report. As a result, more nations are now better positioned to take advantage of the growing popularity of online T&T service offerings, platforms, information distribution and marketing opportunities.

Prioritizing the T&T sector

Economies across the world are increasingly recognizing the importance of T&T, demonstrated by a steadfast rise in the Prioritization of T&T (pillar 6). This notable broad improvement in T&T prioritization has been characterized by more effective marketing and branding strategies, as competition—globally, regionally and even within subregions—for the growing number of tourists heats up. Moreover, perceptions of government prioritization of T&T rose as did government funding for the industry.

Opening doors to safe and secure tourism

The improvement in International Openness (pillar 7) was led by countries not classified as high-income, especially those economies that implemented policies related to the lowering of visa requirements. In particular, Middle East and North Africa, Sub-Sharan Africa and Eurasia—areas historically known for low levels of international openness—have come closer to narrowing their gap with the global mean. In subregions like Eurasia, South America, Western Africa and the Middle East, growth in air travel and international openness has coincided with enhanced safety and security conditions, indicating that recent stabilization may have reduced traveller safety concerns. North Africa experienced a similar phenomenon with increased air travel and safety and security conditions; however, reduced international openness could potentially dampen the impact.

Critical checkpoints for the industry

Despite improvements across region, subregion and income level, a number of challenges remain for the T&T industry. First, given the forecasted growth in T&T in the coming decade, far more investment is required in infrastructure in order to build capacity to welcome more visitors while adequately serving the needs of citizens. For example, despite the growth in air travel and openness, global average perceptions of air transport infrastructure quality have improved at a far slower rate (at a global average 1.4% and 0.4% for high-income economies since the last report), and airport density statistics have fallen. In addition, while some progress has been made in improving ground and port infrastructure, especially in Asia-Pacific,

the overall growth trend for Ground and Port Infrastructure (pillar 11) has been slower. Furthermore, from a global perspective, perceptions of the quality and efficiency of ground transport infrastructure and services have on average remained near stagnant. Consequently, the risk of future air and ground transport bottlenecks is likely to rise, hurting both the industry and local economies.

Ensuring sustainable tourism

The preservation of natural and cultural resources is another challenge the industry must overcome. Results show that the number of UNESCO cultural and natural sites, as well as intangible cultural heritage listings, keeps growing, indicating greater commitment to preserving some of the key attractions driving people to visit destinations. Encouragingly, Environmental Sustainability (pillar 9) scores have been boosted by the increase in environmental treaty ratifications and improved perceptions that T&T is being developed in a sustainable manner, all of which bodes well for natural resources and nature-based tourism. While this is promising, the enforcement of treaties and protected lands might not be enough to preserve natural resources, given that air pollution, deforestation and species endangerment have continued to rise over the last two years. Since the last edition of the report, the global average score for perceptions of the stringency and enforcement of environmental regulations improved by just 0.4%. Sadly, these perceptions declined the most in Sub-Saharan Africa, a region that already struggles to better utilize its natural assets. As a result, it is vital that T&T stakeholders recognize their role in environmental protection, or they run the risk of losing out on future nature tourism.

Performance by quartile

Top 25%

The top quartile (or top 35) of economies on the TTCI rankings dominate the industry, accounting for about 84% of global T&T GDP and nearly 70% of all international tourist arrivals.[10] All but six of them are high-income economies, 20 are from Europe, 10 are from Asia-Pacific, four from the America's and one (the United Arab Emirates) is from the Middle East and North Africa region. Typically, what separates this quartile from the others is how well many of its members do across all pillars. The top 25% tend to greatly outscore the global average on all pillars apart from Price Competitiveness. The high concentration of advanced economies in the top quartile means that this group is characterized by strong business environments, good safety and healthcare conditions and high ICT readiness. They are also comparatively more open to receiving international visitors than other countries. However, their greatest advantages come from well-developed infrastructure and natural and cultural resources.

The top 25% of scorers beat the global mean for air transport infrastructure by an average of 54.1%. However, the quartile has an even more impressive lead when it comes to cultural resources and business travel, at 73% above the global mean. Economies in this group have nearly 60% of the UNESCO World Cultural Heritage sites and host over 75% of international association meetings. The Cultural Resources and Business Travel pillar also exhibits the most variation in scores among the top 35 economies, making it a key point of competition. China, Mexico, Malaysia,

Figure 4: Pillar performance overview, 2019

Pillar score (1–7 scale)

Key

— Global average
— Top quartile
— Second quartile
— Third quartile
— Bottom quartile
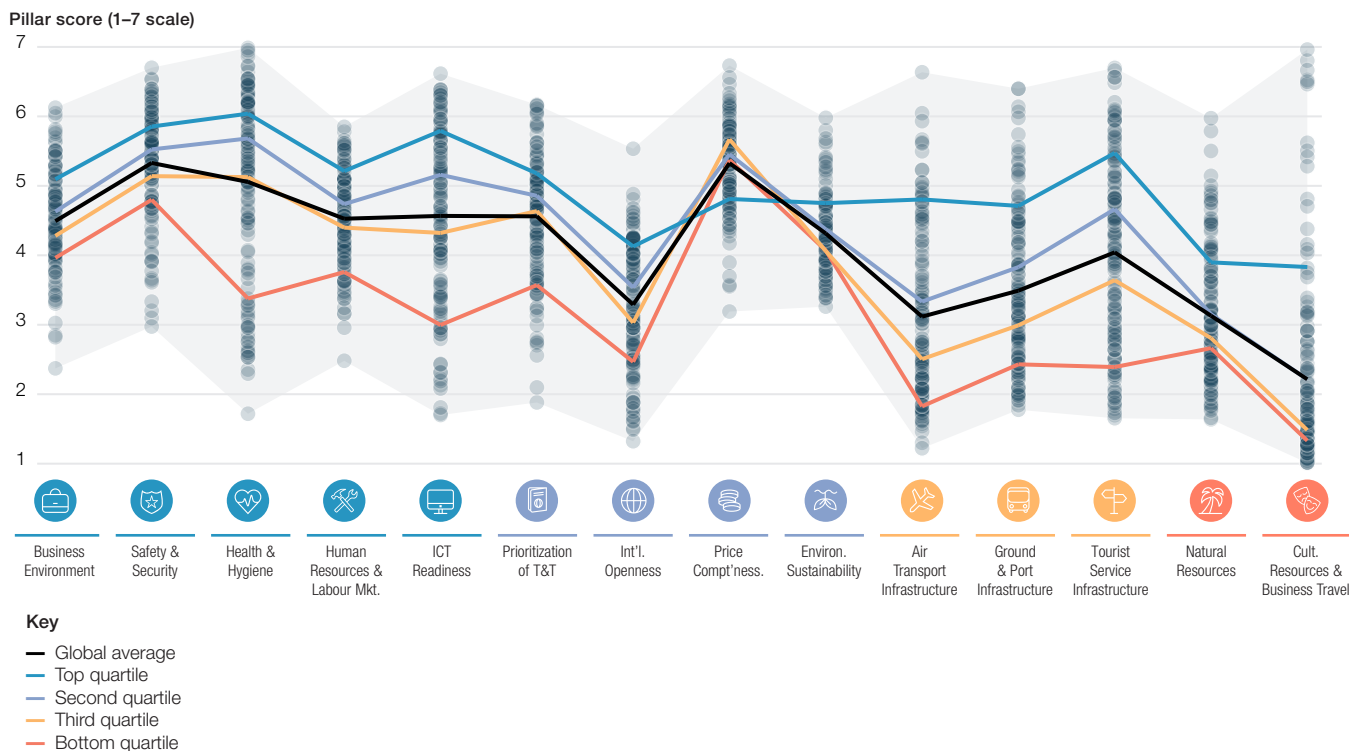
Source: World Economic Forum.

Thailand, Brazil and India—which are not high-income economies but rank in the top 35 on the TTCI—stand out in this quartile through their combination of rich natural and cultural resources and strong price competitiveness.

Due perhaps to its composition of the most mature T&T economies, the top quartile improved at a slower rate than other groupings. Nonetheless, 29 of the top 35 economies increased in competitiveness since 2017. These increases were mostly due to improvements in T&T policy and enabling conditions and air transport infrastructure as well as moderate gains in ICT readiness. The three most improved economies in this quartile are India (40th to 34th), Korea, Rep. (19th to 16th) and Denmark (31st to 21st). India showed the greatest percentage improvement to its overall TTCI score, which has helped it become the only lower-middle income country in the top 35. Aside from the aforementioned high ranking of its natural and cultural assets and price competitiveness, India also greatly improved its business environment (89th to 39th), overall T&T policy and enabling conditions (79th to 69th), infrastructure (58th to 55th) and ICT readiness (112th to 105th). Of all the other quartiles, the top 25% was the only one to improve its average performance on the Business Environment pillar, with India, China (92nd to 53rd), and the United States (16th to 4th) showing the greatest percentage increases.

The top 10 scoring economies remain unchanged, consisting—in descending order by global rank—of Spain, France, Germany, Japan, the United States, the United Kingdom, Australia, Italy, Canada and Switzerland. Of these, only the United Kingdom lost its position since 2017 (5th to 6th), switching places with the more competitive United States (6th to 5th).

Middle 50%

As one moves down the TTCI rankings into the middle half of economies (ranks 36–105), the variance between pillar scores begins to rise. Countries here consist of many emerging market economies, with growing middle classes and tourism industries, and a selection of more developed economies that typically lack the numerous attractive natural and cultural resources that the top scorers possess. With a large concentration of less mature economies, countries in the middle of the ranking score lower for business environment, human resources and labour market and ICT readiness, creating more obstacles for T&T operations and investment. Further, compared to the top 25% of scorers, middle-ranking economies trail in international openness and especially in infrastructure and cultural and natural resources. On the other hand, price competitiveness does pick up.

However, because of their emerging-market status, economies in this grouping offer higher rates of return for T&T investors willing to deal with less favourable enabling environments, especially as many of these economies become more internationally open and investment in infrastructure and destination assets improve. This is evidenced by TTCI results showing that the middle 50% had the greatest improvement in T&T competitiveness. Economies in the upper-middle quartile (ranks 36 to 70) have the greatest rates of improvement on air, ground and tourist infrastructure and price competitiveness. This quartile does include many economies that do have rich natural and cultural resources, but are held back by underdeveloped infrastructure, security concerns or policy or structural issues. For instance, Argentina, Peru, South Africa, Indonesia and Colombia all score in the top 20 on the Natural and Cultural Resources subindex, but none rank higher than 69th (Argentina) on the Enabling Environment subindex.

Of the 35 economies that rank between 36th and 70th, 29 increased their overall T&T competitiveness. Egypt (74th to 65th), Montenegro (72nd to 67th) and Romania (68th to 56th) had the strongest percentage increase in TTCI scores, improving on most pillars. As previously noted, it was this quartile that outpaced the rest of the world when it comes to enhancement of overall infrastructure. Poland improved the most on air transport infrastructure (70th to 56th), Cyprus had the best growth on ground and port infrastructure (51st to 32nd) and Georgia had the biggest percentage rise on tourist service infrastructure (70th to 41st). For those countries ranked 71st to 105th, Serbia (95th to 83th), Albania (98th to 86th) and Ukraine (88th to 78th) experienced the most significant improvement in TTCI scores.

Bottom 25%

The bottom quartile consists mostly of low to lower-middle income economies, with 26 coming from Sub-Saharan Africa. Lower levels of economic development do translate into particularly poor competitive conditions for T&T. Even compared to the third-lowest quartile, the bottom 35 countries score significantly lower on most pillars—in particular, overall infrastructure, international openness, ICT readiness and health and hygiene. Also similar to the third-lowest quartile, nations in this group score below average for natural and cultural resources. As a result, the bottom 35 economies account for just 1.8% of T&T GDP and 2.5% of tourist arrivals of the economies ranked in this report.[11]

Though they've started from a low base, economies in this quartile did show improvement on T&T policy and enabling conditions, safety and security, ICT readiness, and air and ground infrastructure. They had the largest improvement on international openness, which is likely to lead to greater connectivity. Four of the 10 economies that showed the biggest reduction in visa requirements in the overall rankings are in Sub-Saharan Africa. Benin had the world's largest drop in requirements (122nd to 7th), which contributed to the global TTCI's greatest improvement on international openness in all 140 economies (133rd to 92nd). Bangladesh (125th to 120th), Pakistan (124th to 121st) and Lesotho (128th to 124th) led the quartile in overall growth in T&T competitiveness. However, all three still require substantial improvement in competitiveness to move up in rank and out of the bottom quartile.

Notes

1. World Travel & Tourism Council, Tourism Satellite Account Research, 2019.

2. World Travel & Tourism Council, Tourism Satellite Account Research, and World Tourism Organization 2018, UNWTO database, latest available data, UNWTO, Madrid.

3. Visa Openness Index, *Africa Visa Openness Report 2018*, 2018.

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6. Mezzofiore, G. and R. Picheta, "Venice will stop letting huge cruise ships dock in its historic center", *CNN*, 8 August 2019, https://www.cnn.com/travel/article/venice-cruise-ships-lagoon-scli-intl/index.html.

7. Bloom Consulting, *Country Brand Ranking, Tourism Edition*, https://www.bloom-consulting.com/en/country-brand-ranking, and World Tourism Organization 2018, UNWTO database, latest available data, UNWTO, Madrid.

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11. Ibid.

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Part 2
Regional Analysis

How to Read the Regional Profiles

This guide explains in detail the regional analysis section of the *Travel & Tourism Competitiveness Report 2019.* This analysis can be accessed as part of the entire 2019 report or individually downloaded at http://reports.weforum.org/ttcr/.

This analysis is intended to provide readers with a high-level overview of T&T competitiveness within the five regional groupings covered in the 2019 index. This approach provides an opportunity for policy-makers and industries/investors alike to understand opportunities in context of regional growth and gaps, and to identify strategies that will maximise return on investment from a regional approach. While the regional profiles provide insight into trends please note that such regional trends and averages might not be reflective of the performance of some individual economies as country performance varies greatly within regions. To access individual country profiles, please go to http://reports.weforum.org/ttcr/.

The five regions in alphabetical order are: **The Americas, Asia-Pacific, Europe and Eurasia, the Middle East and North Africa,** and **Sub-Saharan Africa.** See page 102 for list of country/economy groupings by region and subregion.

Each regional profile consists of: 1) Regional Dashboard, 2) Pillar Snapshot, 3) TTCI regional rankings table, 4) TTC regional scores heatmap, and 5) written analysis.

Please note:

- Any mention of country/economy grouping averages (i.e. global or regional averages) in TTCI or component growth since the 2017 index is based on the average (arithmetic) of countries covered in both the 2017 and 2019 report. As a result, performance may be over- or understated.

- Unless otherwise noted, figures in parenthesis represent an economy's global ranking (out of 140) for the mentioned metric.

- Differences between pillars and growth rates might not be reflected in the scores provided due to the rounding of scores to the tenth decimal point.

- All mentions of T&T GDP, domestic and visitor share of internal spending and employment figures comes

from the World Travel & Tourism Council (WTTC). International tourist arrivals, expenditures and receipts data comes from the World Tourism Organization (UNWTO). For more details on these sources, see details on the Regional Dashboard below.

Regional Dashboard
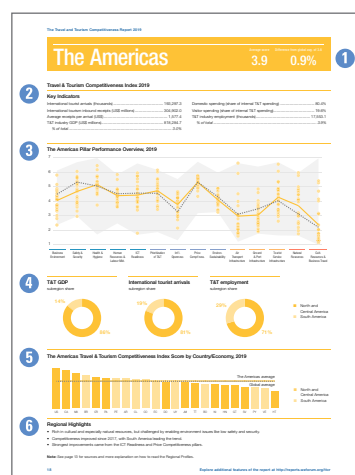
❶ Average score and global average comparison

Presents the average (arithmetic) TTCI score for all economies in the region and the percentage difference between the average (arithmetic) TTCI score for the 140 economies covered by the 2019 report and the regional average (arithmetic) score.

❷ Key Indicators

Presents several important statistics illuminating the context of a region's overall economy and its T&T sector in particular. Please note that all figures are aggregate totals for the countries covered in region. Included here are the number of international tourist arrivals per year, international tourism receipts (US$ millions), and the ratio between these two measures as of 2017 (or most recent). This data is provided by the UNWTO's International Tourism Receipts and Expenditure data. International tourism receipts count as exports in the balance of payments (travel) of each destination country and cover all transactions related to the consumption of goods and services by international

visitors, such as accommodation, food and drink, fuel, domestic transport, entertainment, shopping, etc. They include transactions generated by same-day as well as overnight visitors. Not included are receipts from international passenger transport contracted from companies outside the travellers' countries of residence, which are reported in a separate category (passenger transport). For more information, please see the International Recommendations for Tourism Statistics 2008 (IRTS 2008) at: http://statistics. unwto.org/content/methodology-0. This section also includes 2018 direct T&T industry GDP, T&T industry GDP as a share of the total economy, domestic and visitor (export) spending as a share of internal T&T spending, and total T&T industry employment as well as its share of total economy. This data is estimated by the World Travel & Tourism Council (WTTC), using the TSA approach. WTTC estimates that current and projected future several trips to a given country during a given period will be counted as a new arrival each time. More information regarding WTTC's TSA Research, along with details on the methodology and data, are available at https://www.wttc.org/publications/.

❸ Regional pillar performance overview

Presents country/economy distribution of global TTCI scores for each of the 14 pillars of the index, colour-coded by subregion (colour key is adjacent to subregion share pie charts). The dotted horizontal line represents the average (arithmetic) pillar score for the 140 economies covered by the 2019 report, while the solid horizontal line represents the average (arithmetic) pillar score for the region. The shaded area presents the outer boundaries of each pillar and are generated by the lowest and highest scoring economy for each pillar. Pillar titles are colour-coded by subindex (colours correspond to the colours in the Pillar Snapshot) .

❹ Subregion share pie charts

Shows the aggregate T&T GDP, international tourist arrivals and T&T employment by subregion share. Charts are sourced from the key indicators section. Note that data is rounded to the nearest whole number.

❺ Regional TTCI score by country

Presents TTCI scores for each economy in the region, from highest (left) to lowest (right). The dotted horizontal line represents the average (arithmetic) TTCI score for the 140 economies covered by the 2019 report and the solid horizontal line represents the average (arithmetic) TTCI score for the region. Vertical bars are colour-coded by subregion. Economy names are presented as two-letter codes based on ISO classification. Please see pages 16–17 for a full list of country/economy names and their corresponding ISO-2 codes.

❻ Regional highlights
Provides brief high-level takeaways about the region.

Pillar Snapshot

Presents regional performance for each TTCI pillar, including:

- Regional average (arithmetic) score, with arrow representing direction of change since the 2017 TTCI. Please note that performance since 2017 is always based on economies covered in both the 2017 and 2019 editions of the TTCI. As a result, performance may be over- or understated.

- Difference from global avg. (%)—the percentage difference between the average (arithmetic) pillar score for the 140 economies covered by the 2019 report and the regional average (arithmetic) score.

- Names of the region's highest-scoring economy on the pillar and the economy that had the highest score increase (by percentage) since the 2017 report.

- Short overview of the highest-scoring economy in the region for the pillar, including its global pillar ranking and key metrics that explain its position.

TTCI 2019 Rankings

Presents a region's economies in descending order by global rank (TTCI score is also included). **Difference from 2017** columns list each economy's change in rank and score (by percentage) since the 2017 edition of the TTCI. Countries not covered in the 2017 TTCI are given 'n/a' values. **Score difference from benchmark average** columns list the percentage difference between country TTCI score and both the global average (arithmetic) score (derived from all 140 economies in 2019) and the regional average (arithmetic) score.

TTCI 2019 Scores

Presents country/economy global scores for each pillar, as well as regional and subregional average (arithmetic) scores. Score values are colour-coded according to the country's position relative to global scores.

Written analysis

Presents the following detailed insights:

- General overview of T&T competitiveness in the region.

- Subregional analysis, including overarching trends and a short discussion of each subregion's largest T&T economy (by T&T direct GDP), top and bottom TTCI scorers and most-improved T&T economy measured by percentage change in TTCI score since the 2017 index.

- Analysis of three countries/economies in the region: 1) top-scoring economy, 2) largest T&T economy (by T&T direct GDP) and 3) most-improved economy measured by percentage change in TTCI score since the 2017 index. Note that when an economy meets more than one of these criteria, selection for a third country comes from a subregion level (see The Americas region).

ISO-2 Code Lookup Table

The Americas	
ISO-2 Code	**Economy**
AR	Argentina
BO	Bolivia
BR	Brazil
CA	Canada
CL	Chile
CO	Colombia
CR	Costa Rica
DO	Dominican Republic
EC	Ecuador
GT	Guatemala
HN	Honduras
HT	Haiti
JM	Jamaica
MX	Mexico
NI	Nicaragua
PA	Panama
PE	Peru
PY	Paraguay
SV	El Salvador
TT	Trinidad and Tobago
US	United States
UY	Uruguay
VE	Venezuela

Asia-Pacific	
ISO-2 Code	**Economy**
AU	Australia
BD	Bangladesh
BN	Brunei Darussalam
CN	China
HK	Hong Kong SAR
ID	Indonesia
IN	India
JP	Japan
KH	Cambodia
KR	Korea, Rep.
LA	Lao PDR
LK	Sri Lanka
MN	Mongolia
MY	Malaysia
NP	Nepal
NZ	New Zealand
PH	Philippines
PK	Pakistan
SG	Singapore
TH	Thailand
TW	Taiwan, China
VN	Vietnam

Europe and Eurasia	
ISO-2 Code	**Economy**
AL	Albania
AM	Armenia
AT	Austria
AZ	Azerbaijan
BA	Bosnia and Herzegovina
BE	Belgium
BG	Bulgaria
CH	Switzerland
CY	Cyprus
CZ	Czech Republic
DE	Germany
DK	Denmark
EE	Estonia
ES	Spain
FI	Finland
FR	France
GB	United Kingdom
GE	Georgia
GR	Greece
HR	Croatia
HU	Hungary
IE	Ireland
IS	Iceland
IT	Italy
KG	Kyrgyz Republic
KZ	Kazakhstan
LT	Lithuania
LU	Luxembourg
LV	Latvia
MD	Moldova
ME	Montenegro
MK	North Macedonia
MT	Malta
NL	Netherlands
NO	Norway
PL	Poland
PT	Portugal
RO	Romania
RS	Serbia
RU	Russian Federation
SE	Sweden
SI	Slovenia
SK	Slovak Republic
TJ	Tajikistan
TR	Turkey
UA	Ukraine

Middle East and North Africa (MENA)	
ISO-2 Code	**Economy**
AE	United Arab Emirates
BH	Bahrain
DZ	Algeria
EG	Egypt
IL	Israel
IR	Iran, Islamic Rep.
JO	Jordan
KW	Kuwait
LB	Lebanon
MA	Morocco
OM	Oman
QA	Qatar
SA	Saudi Arabia
TN	Tunisia
YE	Yemen

Sub-Saharan Africa	
ISO-2 Code	**Economy**
AO	Angola
BF	Burkina Faso
BI	Burundi
BJ	Benin
BW	Botswana
CD	Congo, Democratic Rep.
CI	Côte d'Ivoire
CM	Cameroon
CV	Cape Verde
ET	Ethiopia
GH	Ghana
GM	Gambia, The
GN	Guinea
KE	Kenya
LR	Liberia
LS	Lesotho
ML	Mali
MR	Mauritania
MU	Mauritius
MW	Malawi
MZ	Mozambique
NA	Namibia
NG	Nigeria
RW	Rwanda
SC	Seychelles
SL	Sierra Leone
SN	Senegal
SZ	Eswatini
TD	Chad
TZ	Tanzania
UG	Uganda
ZA	South Africa
ZM	Zambia
ZW	Zimbabwe

Source: International Standard for Organization, https://www.iso.org/home.html.

ISO-2 Code Reverse Lookup Table

The Americas	
Economy	ISO-2 Code
Argentina	AR
Bolivia	BO
Brazil	BR
Canada	CA
Chile	CL
Colombia	CO
Costa Rica	CR
Dominican Republic	DO
Ecuador	EC
El Salvador	SV
Guatemala	GT
Haiti	HT
Honduras	HN
Jamaica	JM
Mexico	MX
Nicaragua	NI
Panama	PA
Paraguay	PY
Peru	PE
Trinidad and Tobago	TT
United States	US
Uruguay	UY
Venezuela	VE

Asia-Pacific	
Economy	ISO-2 Code
Australia	AU
Bangladesh	BD
Brunei Darussalam	BN
Cambodia	KH
China	CN
Hong Kong SAR	HK
India	IN
Indonesia	ID
Japan	JP
Korea, Rep.	KR
Lao PDR	LA
Malaysia	MY
Mongolia	MN
Nepal	NP
New Zealand	NZ
Pakistan	PK
Philippines	PH
Singapore	SG
Sri Lanka	LK
Taiwan, China	TW
Thailand	TH
Vietnam	VN

Europe and Eurasia	
Economy	ISO-2 Code
Albania	AL
Armenia	AM
Austria	AT
Azerbaijan	AZ
Belgium	BE
Bosnia and Herzegovina	BA
Bulgaria	BG
Croatia	HR
Cyprus	CY
Czech Republic	CZ
Denmark	DK
Estonia	EE
Finland	FI
France	FR
Georgia	GE
Germany	DE
Greece	GR
Hungary	HU
Iceland	IS
Ireland	IE
Italy	IT
Kazakhstan	KZ
Kyrgyz Republic	KG
Latvia	LV
Lithuania	LT
Luxembourg	LU
Malta	MT
Moldova	MD
Montenegro	ME
Netherlands	NL
North Macedonia	MK
Norway	NO
Poland	PL
Portugal	PT
Romania	RO
Russian Federation	RU
Serbia	RS
Slovak Republic	SK
Slovenia	SI
Spain	ES
Sweden	SE
Switzerland	CH
Tajikistan	TJ
Turkey	TR
Ukraine	UA
United Kingdom	GB

Middle East and North Africa (MENA)	
Economy	ISO-2 Code
Algeria	DZ
Bahrain	BH
Egypt	EG
Iran, Islamic Rep.	IR
Israel	IL
Jordan	JO
Kuwait	KW
Lebanon	LB
Morocco	MA
Oman	OM
Qatar	QA
Saudi Arabia	SA
Tunisia	TN
United Arab Emirates	AE
Yemen	YE

Sub-Saharan Africa	
Economy	ISO-2 Code
Angola	AO
Benin	BJ
Botswana	BW
Burkina Faso	BF
Burundi	BI
Cameroon	CM
Cape Verde	CV
Chad	TD
Congo, Democratic Rep.	CD
Côte d'Ivoire	CI
Eswatini	SZ
Ethiopia	ET
Gambia, The	GM
Ghana	GH
Guinea	GN
Kenya	KE
Lesotho	LS
Liberia	LR
Malawi	MW
Mali	ML
Mauritania	MR
Mauritius	MU
Mozambique	MZ
Namibia	NA
Nigeria	NG
Rwanda	RW
Senegal	SN
Seychelles	SC
Sierra Leone	SL
South Africa	ZA
Tanzania	TZ
Uganda	UG
Zambia	ZM
Zimbabwe	ZW

Source: International Standard for Organization, https://www.iso.org/home.html.

The Americas

Average score
3.9

Difference from global avg. of 3.8
0.9%

Travel & Tourism Competitiveness Index 2019

Key Indicators

International tourist arrivals (thousands)	193,297.3
International tourism inbound receipts (US$ millions)	304,902.0
Average receipts per arrival (US$)	1,577.4
T&T industry GDP (US$ millions)	818,284.7
% of total	*3.0%*

Domestic spending (share of internal T&T spending)	80.4%
Visitor spending (share of internal T&T spending)	19.6%
T&T industry employment (thousands)	17,553.1
% of total	*3.9%*

The Americas Pillar Performance Overview, 2019
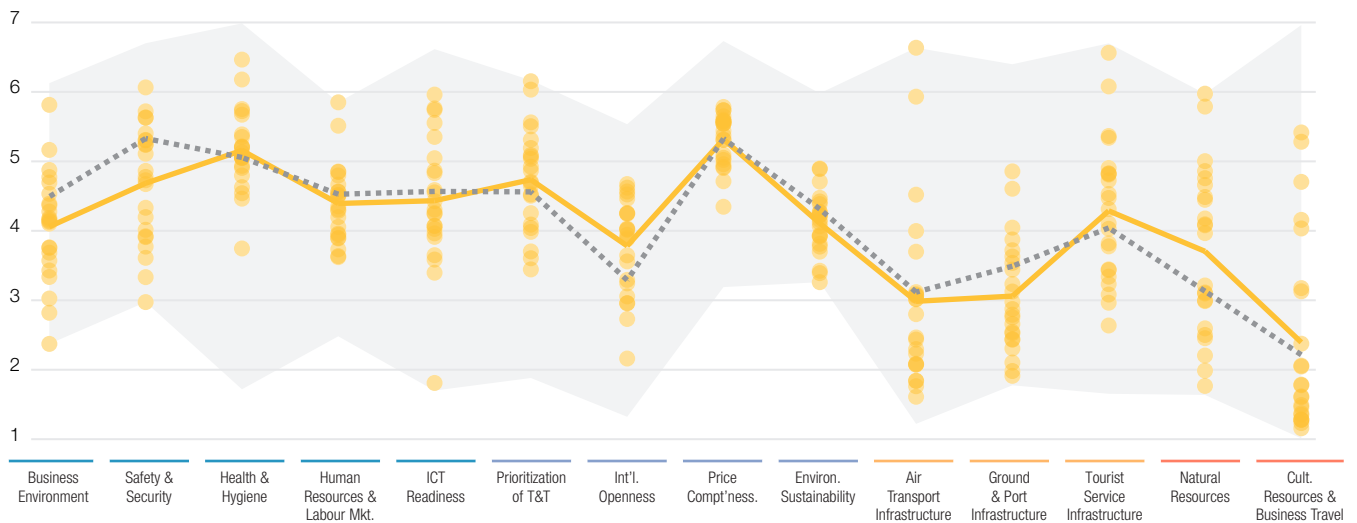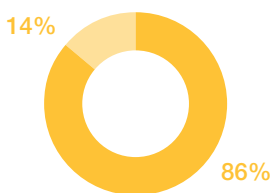
T&T GDP
subregion share

14%
86%

International tourist arrivals
subregion share

19%
81%

T&T employment
subregion share

29%
71%
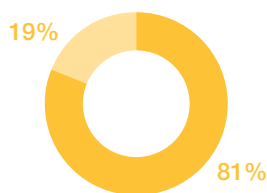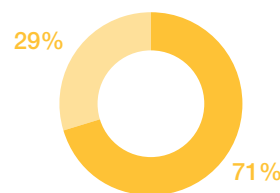
■ North and Central America
■ South America

The Americas Travel & Tourism Competitiveness Index Score by Country/Economy, 2019

The Americas average

Global average

US CA MX BR CR PA PE AR CL CO EC DO UY JM TT BO NI HN GT SV PY VE HT

■ North and Central America
■ South America
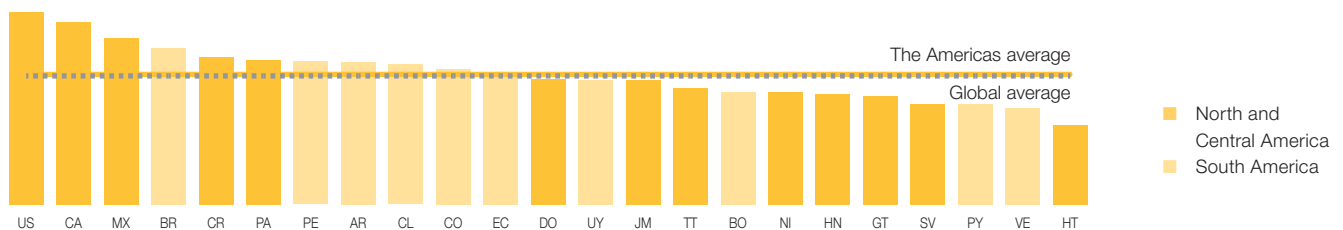
Regional Highlights

- Rich in cultural and especially natural resources, but challenged by enabling environment issues like low safety and security.
- Competitiveness improved since 2017, with South America leading the trend.
- Strongest improvements came from the ICT Readiness and Price Competitiveness pillars.

Note: See page 13 for sources and more explanation on how to read the Regional Profiles.

The Americas Pillar Snapshot

Business Environment

Regional average
4.1 ▼

Difference from global avg. of 4.5
−9.6%

Top scorer:	**United States**
Most improved:	**United States**

The United States ranks 4th globally thanks to reduced impact of taxes on work and investment (24th to 11th) and an increasingly efficient legal system.

Safety and Security

Regional average
4.7 ▲

Difference from global avg. of 5.3
−12.1%

Top scorer:	**Canada**
Most improved:	**Colombia**

Canada ranks 21st globally thanks to a reliable police force (7th).

Health and Hygiene

Regional average
5.2 ▲

Difference from global avg. of 5.1
2.0%

Top scorer:	**Argentina**
Most improved:	**Trinidad and Tobago**

Argentina ranks 14th globally thanks to availability of relevant utilities (1st), low to non-existent malaria (1st) rates and physician (17th) and hospital density.

Human Resources and Labour Market

Regional average
4.4 ▼

Difference from global avg. of 4.5
−2.9%

Top scorer:	**United States**
Most improved:	**United States**

The United States ranks 1st thanks to a strong link between pay and productivity (1st), and ease of finding skilled labour (1st) and hiring foreign workers (7th).

ICT Readiness

Regional average
4.4 ▲

Difference from global avg. of 4.6
−2.9%

Top scorer:	**United States**
Most improved:	**El Salvador**

The United States ranks 18th globally thanks to high density of mobile broadband internet subscriptions (9th) and extensive use of ICT in business (4th).

Prioritization of Travel & Tourism

Regional average
4.7 ▲

Difference from global avg. of 4.6
3.8%

Top scorer:	**Jamaica**
Most improved:	**Trinidad and Tobago**

Jamaica ranks 2nd globally thanks to government prioritization (2nd), spending on T&T (3rd) and effectiveness in tourism marketing (6th).

International Openness

Regional average
3.8 ▲

Difference from global avg. of 3.3
15.0%

Top scorer:	**Chile**
Most improved:	**Bolivia**

Chile ranks 4th globally, thanks to relatively open air service agreements (18th) and quantity of trade agreements (29th).

Price Competitiveness

Regional average
5.3 ▲

Difference from global avg. of 5.3
−0.2%

Top scorer:	**Colombia**
Most improved:	**Peru**

Colombia ranks 29th globally thanks to low hotel prices (16th) and drastically reduced ticket taxes and airport charges (90th).

Environmental Sustainability

Regional average
4.1 ▲

Difference from global avg. of 4.3
−4.8%

Top scorer:	**Canada**
Most improved:	**Dominican Republic**

Canada ranks 16th globally thanks to good wastewater treatment (26th) and environmental regulatory enforcement and stringency (12th).

Air Transport Infrastructure

Regional average
3.0 ▲

Difference from global avg. of 3.1
−4.2%

Top scorer:	**Canada**
Most improved:	**Argentina**

Canada ranks 1st globally thanks to high-quality air infrastructure (12th), high airport density (5th), airline route capacity (11th) and number of operating carriers (11th).

Ground and Port Infrastructure

Regional average
3.1 ▲

Difference from global avg. of 3.5
−12.3%

Top scorer:	**United States**
Most improved:	**Costa Rica**

The United States ranks 18th globally thanks to ground transport efficiency (6th) and quality of railroad (5th) and port (8th) infrastructure.

Tourist Service Infrastructure

Regional average
4.3 ▲

Difference from global avg. of 4.0
6.1%

Top scorer:	**United States**
Most improved:	**Peru**

The United States ranks 4th globally thanks to good hotel density and high perception of its tourism infrastructure quality (12th).

Natural Resources

Regional average
3.7 ▼

Difference from global avg. of 3.1
18.3%

Top scorer:	**Mexico**
Most improved:	**Paraguay**

Mexico ranks 1st globally thanks to attractive natural assets (11th), strong digital demand (6th), extensive wildlife (9th) and numerous natural heritage sites (7th).

Cultural Resources and Business Travel

Regional average
2.4 ▼

Difference from global avg. of 2.2
8.1%

Top scorer:	**Brazil**
Most improved:	**Dominican Republic**

Brazil ranks 9th globally thanks to numerous sport stadiums (6th), cultural and entertainment digital demand (10th) and numerous international association meetings (14th).

The Americas TTCI 2019 Rankings

Global Rank	Economy	Score	DIFFERENCE FROM 2017		SCORE DIFF. FROM BENCHMARK AVG.	
			Rank	Score Growth (%)	Regional (%)	Global (%)
5	United States	5.3	1.0	2.6	35.4	36.6
9	Canada	5.1	0.0	1.6	30.1	31.3
19	Mexico	4.7	3.0	3.4	20.8	21.9
32	Brazil	4.5	−5.0	−0.8	14.8	15.8
41	Costa Rica	4.3	−3.0	1.0	10.0	10.9
47	Panama	4.2	−12.0	−4.0	8.0	9.0
49	Peru	4.2	3.0	3.1	7.4	8.3
50	Argentina	4.2	1.0	2.5	7.0	7.9
52	Chile	4.1	−3.0	0.9	5.6	6.6
55	Colombia	4.0	7.0	4.7	3.3	4.2
70	Ecuador	3.9	−10.0	−0.7	−0.4	0.4
73	Dominican Republic	3.8	3.0	4.5	−2.7	−1.9
74	Uruguay	3.8	3.0	4.2	−3.0	−2.1
76	Jamaica	3.7	−7.0	0.9	−3.4	−2.6
87	Trinidad and Tobago	3.6	−14.0	−2.4	−7.7	−6.9
90	Bolivia	3.5	9.0	4.7	−9.9	−9.1
91	Nicaragua	3.5	1.0	1.6	−10.0	−9.2
94	Honduras	3.5	−4.0	−0.1	−10.9	−10.2
99	Guatemala	3.4	−13.0	−3.2	−12.6	−11.8
108	El Salvador	3.2	−3.0	−0.7	−16.7	−16.0
109	Paraguay	3.2	3.0	3.2	−16.7	−16.0
117	Venezuela	3.1	−14.0	−4.6	−19.3	−18.6
133	Haiti	2.8	n/a	n/a	−28.9	−28.2

Source: World Economic Forum, 2019.

The Americas TTCI 2019 Scores

	Global Rank	ENABLING ENVIRONMENT					T&T POLICY & ENABLING CONDITIONS				INFRASTRUCTURE			NATURAL & CULT. RESOURCES	
		Business Environment	Safety & Security	Health & Hygiene	Human Resources & Labor Market	ICT Readiness	Prioritization of T&T	Int'l. Openness	Price Compt'ness.	Environ. Sustainability	Air Transport Infrastructure	Ground & Port Infrastructure	Tourist Service Infrastructure	Natural Resources	Cultural Res. & Business Travel
United States	5	5.8	5.6	5.8	5.8	6.0	5.5	4.0	4.7	4.1	5.9	4.9	6.6	5.0	4.7
Canada	9	5.2	6.1	5.7	5.5	5.8	5.1	3.6	4.9	4.9	6.6	3.9	6.1	4.8	4.0
Mexico	19	4.2	4.2	5.4	4.5	4.4	5.2	3.9	5.3	3.9	4.0	3.2	4.8	6.0	5.3
Costa Rica	41	4.5	5.4	5.1	4.9	5.6	5.6	4.3	5.1	4.9	3.1	3.0	5.4	4.9	1.6
Panama	47	4.7	5.3	5.1	4.1	4.6	4.9	4.5	5.6	4.7	4.5	3.7	4.7	4.0	1.6
Dominican Republic	73	4.1	4.7	5.0	4.4	4.0	6.0	3.3	5.0	4.1	3.0	3.6	4.8	3.0	1.5
Jamaica	76	4.8	3.9	4.9	4.8	4.3	6.2	4.0	4.3	3.4	2.5	4.6	4.9	2.6	1.4
Trinidad and Tobago	87	4.4	3.9	5.7	4.5	5.0	4.0	3.6	5.6	3.9	3.1	4.0	4.1	2.0	1.2
Nicaragua	91	3.4	5.6	4.6	4.2	3.6	4.9	4.2	5.6	4.2	2.1	2.8	3.4	3.1	1.3
Honduras	94	4.1	3.6	4.5	3.9	3.4	5.1	4.3	5.5	4.5	2.1	3.1	3.4	3.1	1.3
Guatemala	99	4.2	4.0	4.5	3.9	4.0	4.5	3.9	5.7	3.9	1.8	2.4	3.8	3.0	1.5
El Salvador	108	3.6	3.0	5.1	3.7	4.2	4.3	4.6	5.7	3.8	2.1	2.9	3.1	2.2	1.3
Haiti	133	3.0	4.8	3.7	3.6	1.8	3.6	3.9	5.6	3.3	1.8	1.9	2.6	1.8	1.2
North/Central America Average		**4.3**	**4.6**	**5.0**	**4.4**	**4.4**	**5.0**	**4.0**	**5.3**	**4.1**	**3.3**	**3.4**	**4.4**	**3.5**	**2.1**
Brazil	32	3.7	4.3	5.4	4.3	4.8	4.0	3.0	5.4	4.3	3.7	2.4	4.5	5.8	5.4
Peru	49	4.1	4.7	4.9	4.6	4.1	4.7	4.5	5.3	4.4	2.8	2.5	5.3	4.7	3.1
Argentina	50	3.3	5.1	6.5	4.5	4.9	4.6	3.1	4.9	3.4	3.1	2.7	4.5	4.5	4.2
Chile	52	4.9	5.7	5.2	4.8	5.4	4.7	4.7	5.6	4.2	3.1	3.4	4.3	3.2	2.4
Colombia	55	3.8	3.8	5.2	4.6	4.6	4.1	4.6	5.8	4.4	3.0	2.5	3.8	4.4	3.2
Ecuador	70	3.8	5.2	5.2	4.3	4.3	4.5	4.0	5.5	4.3	2.4	3.5	4.0	4.2	1.8
Uruguay	74	4.4	5.3	6.2	4.7	5.7	5.3	3.0	5.0	4.2	2.3	2.8	4.8	2.5	1.8
Bolivia	90	2.8	5.2	4.8	4.0	4.1	3.7	3.2	5.5	4.2	2.2	2.1	3.3	4.1	2.0
Paraguay	109	4.3	4.9	5.1	3.9	3.9	5.0	2.7	5.4	3.8	1.6	2.3	3.2	2.5	1.4
Venezuela	117	2.4	3.3	5.1	3.6	3.6	3.4	2.2	5.1	3.7	1.8	2.0	3.0	4.1	2.1
South America Average		**3.7**	**4.8**	**5.4**	**4.3**	**4.5**	**4.4**	**3.5**	**5.4**	**4.1**	**2.6**	**2.6**	**4.1**	**4.0**	**2.7**
THE AMERICAS		**4.1**	**4.7**	**5.2**	**4.4**	**4.4**	**4.7**	**3.8**	**5.3**	**4.1**	**3.0**	**3.1**	**4.3**	**3.7**	**2.4**

Bottom 20%   Top 20%

The Americas Regional Analysis

Overview

The Americas region improved its T&T competitiveness performance since the last edition of the report in 2017 and remains more competitive than the global average—an encouraging trend given that in over half the countries in the Americas, the T&T industry's share of GDP is greater than the aggregate global level. The region has the third-largest T&T sector in terms of GDP, international arrivals and international tourist receipts. However, T&T in the Americas is also dominated by a handful of large economies, with the United States, Canada, Mexico and Brazil being the region's top TTCI score performers and accounting for most of the region's tourism industry, international arrivals—including outbound and inbound intraregional travel—and related spending. Moreover, thanks to these nations' internal market size and T&T competitiveness, domestic expenditure accounts for a greater share of total T&T spending in the Americas than in any other region. Consequently, many regional players need to continue to improve their competitiveness to benefit from proximity to such large markets. They can, for instance, strive to lure travellers from those market's domestic alternatives, while simultaneously diversifying their own source of arrivals and encouraging intraregional travel outside those four dominant economies.

Overall, the region is more competitive than the global average due to very strong natural and cultural resources as well as advanced T&T policy and enabling conditions, although performance in these areas is held back by below-average overall enabling environments and infrastructure. The region's greatest advantage, however, comes from its abundance of natural resources, which include many UNESCO natural heritage sites and extensive wildlife. The Americas also scores high and continues to improve on international openness, T&T prioritization and tourist service infrastructure. These qualities help member countries take advantage of their natural and cultural assets, and indicate strong policy commitments to tourism.

Yet despite progress in these areas, the region continues to trail the global average when it comes to environmental sustainability and air and ground infrastructure. Throughout the region, improvements have been made to environmental sustainability via increased ratifications of environmental treaties. Nevertheless, habitat destruction—indicated

by growing deforestation and threatened species figures—continues to endanger the region's critical natural assets. This might explain the recent decline in performance on indicators related to natural assets.

However, the region's biggest impediment to competitiveness comes from low marks for enabling environment, especially its business environment and safety and security. Higher taxes, red tape and inefficient legal systems have continued to worsen in many countries, potentially hindering T&T investment. Further, although regional safety and security has improved due to fewer terrorist incidents, exceptionally high homicide rates and unreliable police services persist, dissuading many potential tourists. It's important to note that performance does vary greatly across subregion and country.

Subregion Analysis

Though the **North and Central America** subregion is more competitive than the South America subregion, it did experience minimal TTCI score improvement from 2017 to 2019. The subregion accounts for most of the parent region's T&T industry, including high international arrivals and departures, thanks to the larger economies of Mexico, Canada and, especially, the United States. Overall, the subregion scores higher than both the South America and global averages on international openness, T&T prioritization, air transport and tourist service infrastructure—but lower on safety, health, ICT readiness and cultural resource indicators. In particular, improvement on indicators in the T&T Prioritization and Enabling subindex pillars have been the primary drivers of the subregion's enhanced competitiveness. This includes slightly greater international openness, the subregion's most significant advantage relative to the global average, and far greater price competitiveness, an area where many of its countries trail. The subregion also improved safety and security performance, the area with the largest gap compared to global averages. North and Central America's greatest advantage over South America is its more developed infrastructure, especially air and ground transport infrastructure. Yet the region lags behind global competitors on the latter category. In addition, the subregion scores far higher in business environment than its southern

neighbors; five of the six countries that outperform the global average are located in this subregion. Nevertheless, this advantage has deteriorated and does not translate to a competitive lead in global terms. Similarly, despite improvement, poor environmental sustainability remains a challenge that threatens the subregion's natural assets.

Just over half of North and Central America's member nations improved their competitiveness since the last edition of the report. The **United States** is the both the highest ranking (5th) and largest T&T economy in the entire Americas region, and benefits from a large and wealthy internal market. The **Dominican Republic** is the most improved country in the subregion (76th to 73rd), thanks to above-average regional and global improvement on 11 pillars. **Panama** had the subregion's steepest decline (35th to 47th), with falls on nine pillars, including the region's greatest drop on ground infrastructure (40th to 53rd) due to reduced ground transport efficiency (40th to 46th) and the inclusion of railroad data in which it ranks low (98th). The lowest-ranked country in North and Central America is **Haiti** (133rd), where underdevelopment and a relatively recent major earthquake has led to poor overall infrastructure (130th). The country also lacks developed natural (138th) and cultural (125th) resources, an important disadvantage in a region where many countries excel in such areas.

South America scores slightly less than the North and Central America and global averages but improved its competitiveness at a much faster rate. The subregion has the highest rating for natural resources in the world and is known for its abundant wildlife. It also has rich cultural assets, including a strong sports and entertainment tradition. Helping facilitate the flow of visitors to these and other destination points are above-average tourism service infrastructure, international openness and price competitiveness, which is the subregion's most improved area. Given these strengths, however, South America has a relatively small T&T economy, defined by disproportionally low international tourist arrivals, which helps to explain the subregion's dependence on domestic T&T markets. This can be due to South America's underdeveloped air and ground transport infrastructure—which undermines accessibility—with ground infrastructure being the subregion's greatest disadvantage relative to the global average. Moreover, South America scores lowest for business environment, deterring T&T investment, and has poor safety conditions, which is a particularly important consideration for international travellers. South America also has below-average environmental sustainability, caused primarily by deforestation, habitat loss and relatively lax environmental regulation and enforcement, potentially explaining its declining lead on natural resources. Yet the region has made strides to mitigate these drawbacks, with performance on all relevant pillars improving since the previous report. Additionally, the subregion's lead related to openness and price competitiveness also increased.

All but three of South America's members states covered by this report improved their competitiveness from 2017. Leading this trend is **Bolivia** (99th to 90th), which improved on most pillars, with particularly strong growth on price competitiveness (109th to 61st) and international openness

(88th to 72nd). However, **Brazil** (32nd) retains both the region's largest and most competitive T&T industry and environment, thanks to exceptional natural (2nd) and cultural (9th) resources. **Venezuela** experienced the world's greatest deterioration in T&T competitiveness (104th to 117th), moving into last place in South America. This is unsurprising given the nation's current instability and economic woes. An already poor enabling environment, including security conditions (137th), worsened further, with falls on health (80th to 86th), business (136th to 140th) and labour (116th to 127th) conditions. Additionally, T&T policy and conditions (118th to 133rd) and overall infrastructure (109th to 117th) have moved further behind the global average.

Selected Country/Economy Analysis

The **United States** is the top scorer in the Americas, moving up one place to rank fifth globally. The combination of the overall size of its economy and T&T competitiveness helps explain why the country has the largest T&T GDP in the world, accounting for over one-fifth of the global total. In comparison to the global average, one of the United States' greatest advantages comes from its natural (5th) and cultural (12th) resources, which also helps separate it from many other developed nations in the rankings. The country is well known for its numerous World Heritage natural sites (3rd) and extensive wildlife (13th), which drive nature-based tourist arrivals (35th). The flow of travellers is assisted by excellent air transport (3rd) and tourist services (4th) infrastructure and increasingly efficient ground transport (17th to 6th). However, the primary reason for the United States' improvement is its better enabling environment (25th to 16th), including enhancements to already-strong business environment (16th to 4th) and human resource and labour market (13th to 1st) areas. Combined with solid ICT readiness (18th), these factors help encourage T&T investment, utilization of digital services and business travel.

Despite improvements, the country still underperforms when it comes to safety and security (55th), especially in comparison to the performance of other advanced nations, creating potential safety concerns for visitors. Moreover, while the United States has made significant strides in the stringency and enforcement of its environmental regulations (18th to 5th) and perceptions of its T&T sustainability (25th to 4th), the country still ranks low on overall environmental sustainability (100th). The United States can improve its competitiveness and maintain its natural assets by reducing deforestation (108th) and threatened wildlife (123rd) and showing a greater commitment to environmental treaties (131st). Additionally, high visa requirements (129th) could be reduced to enhance otherwise decent international openness (37th), which, when combined with low price competitiveness (119th), can deter tourists.

Brazil is South America's highest scoring country (ranking 32nd) and its largest T&T economy. The nation relies on its exceptional natural (2nd) and cultural (9th) resources to attract visitors, especially given its less-impressive performance on other areas of T&T competitiveness. The

country has the largest number of known species in the world, fairly extensive protected nature areas (16th) and a significant endowment of UNESCO natural (7th) sites and cultural and intangible heritage UNSESCO listings (19th). Moreover, the country is a major South American economy and sporting nation, with a significant number of international association events (14th) and sports stadiums (6th). Accordingly, Brazil has developed airline route capacity (13th) that can handle large numbers of travellers. Its domestic airline capacity (6th) is especially strong, which is not surprising given that 90% of its T&T spending is domestic, the highest share in the Americas.

However, despite these strengths, Brazil has become less competitive since the 2017 edition of the report, dropping five places on the overall global ranking. The chief reason is its deterioration in the aforementioned advantages. While still impressive, a drop in natural (12th) and cultural (10th) digital demand, and in the number of association meetings, potentially indicates waning interest in Brazil's T&T attractiveness. In part, this can be explained by the country's worsening tourist service infrastructure (39th to 59th), price competitiveness (41st to 72nd) and already poor safety and security (106th to 124th). Safety and security, in particular, has been a major challenge for the country's T&T industry. In addition, even with recent improvements, Brazil still has unfavorable business conditions (127th), a constrained human resource and labour market (88th) and underdeveloped ground and port infrastructure (114th), all of which are compounded by the nation's recent economic woes. In general, to meet its full potential, the country needs to prioritize T&T (106th) and maintain its edge in natural and cultural resources, while simultaneously removing business, infrastructure and security barriers. One example of how Brazil is doing this is the country's increased international openness (96th to 89th), stemming from reduced visa requirements (108th to 81st) and better trade integration (78th to 63rd).

Bolivia is the most improved country in the Americas region, moving up nine places to rank 90th globally. The country had the second-fastest overall growth on T&T policy and enabling conditions (115th to 101st) in the region. Particular areas of improvement include price competitiveness (109th to 61st), due to lowering ticket taxes and airport charges (135th to 121st), and international openness (88th to 72nd), which is due to a reduction in visa requirements (31st to 6th). Additionally, an expansion of protected land (36th to 11th), combined with extensive wildlife (8th), has helped enhance the country's Natural Resources pillar (36th to 27th)—the only pillar besides Price Competitiveness that scores above the global average. However, while these improvements make Bolivia an easier, less expensive and more alluring place to visit, their impact is greatly held back by other factors. For instance, the country's nature advantage is undermined by increasingly lax environmental regulation (131st) and enforcement (131st). Underdeveloped overall infrastructure (105th) also makes it difficult to travel to and around the country. Minimal ICT use for business and consumer services (134th) also reduces Bolivia's potential for T&T in an increasingly digital world. Unsurprisingly, the country scores low on natural (88th) and cultural (74th) digital demand.

Similarly, the country's unfavorable business environment (139th) and labour market (132nd) stifle foreign and domestic investment in its T&T industry. Despite any gains, the country still ranks low on safety and security (89th) and health and hygiene (95th), making potential travellers concerned about their wellbeing. To become truly competitive, Bolivia will need to leverage its natural assets while making significant gains along all TTCI pillars, especially Business Environment, and those in the Infrastructure subindex.

Asia-Pacific

Average score **4.2**

Difference from global avg. of 3.8 **8.1%**

Travel & Tourism Competitiveness Index 2019

Key Indicators

International tourist arrivals (thousands) 290,868.1
International tourism inbound receipts (US$ millions) 339,534.2
Average receipts per arrival (US$) 1,167.3
T&T industry GDP (US$ millions) 874,555.6
   % of total *3.0%*

Domestic spending (share of internal T&T spending) 75.9%
Visitor spending (share of internal T&T spending) 24.1%
T&T industry employment (thousands) 76,735.0
   % of total *4.1%*

Asia-Pacific Pillar Performance Overview, 2019
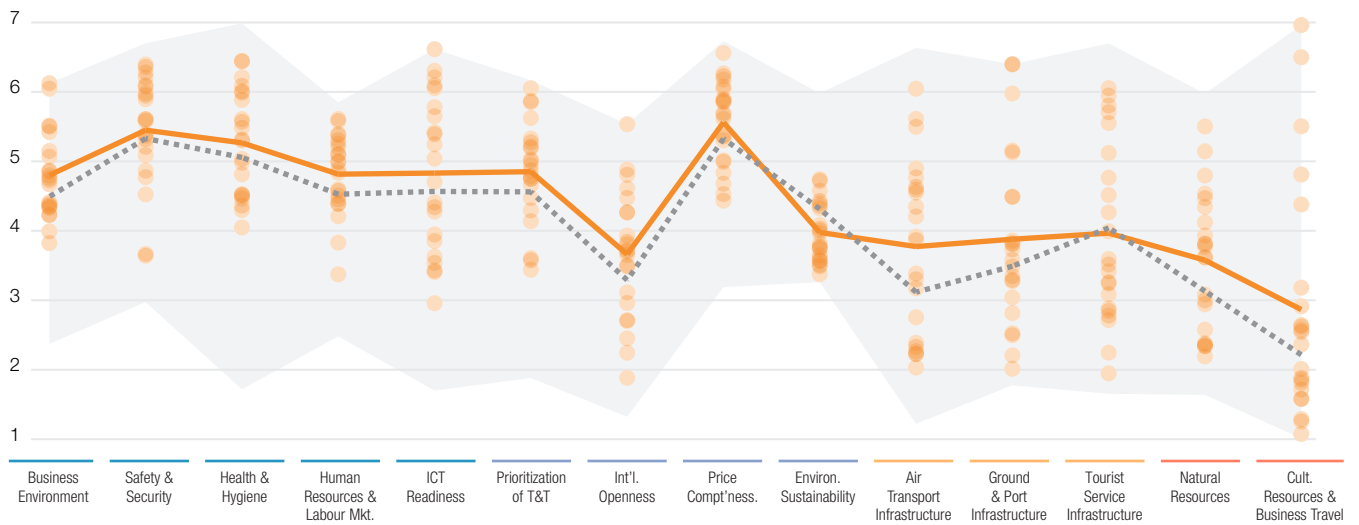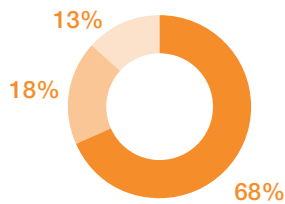
T&T GDP
subregion share

13%
18%
68%

International tourist arrivals
subregion share

7%
40%
53%

T&T employment
subregion share

40%
19%
41%
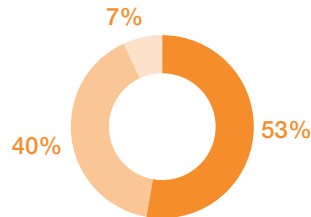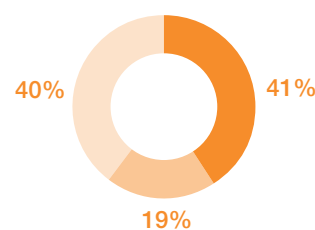
■ Eastern Asia-Pacific
■ South-East Asia
■ South Asia

Asia-Pacific Travel & Tourism Competitiveness Index Score by Country/Economy, 2019

Asia-Pacific average

Global average

JP AU CN HK KR SG NZ MY TH IN TW ID VN BN PH LK MN LA KH NP BD PK

■ Eastern Asia-Pacific
■ South-East Asia
■ South Asia
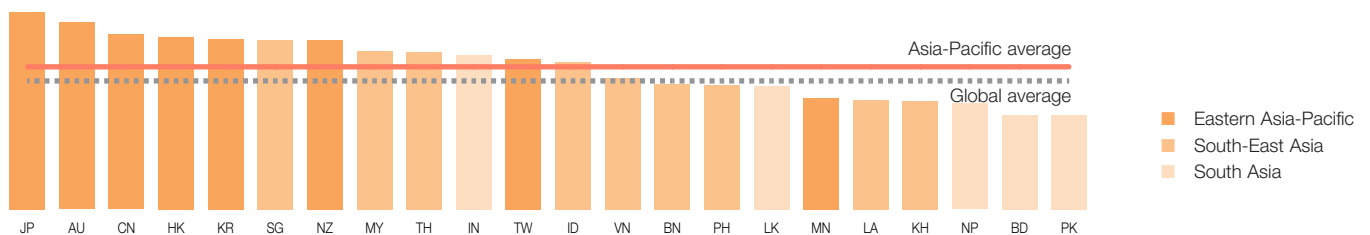
Regional Highlights

- Rapidly improving T&T region, with abundant natural and cultural resources and booming air transport, but environmental sustainability remains a challenge.
- Strongest improvements came from the ICT Readiness, Price Competitiveness and Air Transport Infrastructure pillars.
- World's second-most improved regional average score since 2017, with the South Asia subregion experiencing the most rapid score growth.

Note: See page 13 for sources and more explanation on how to read the Regional Profiles.

Asia-Pacific Pillar Snapshot

Business Environment

Regional average
4.8 ▲

Difference from global avg. of 4.5
6.9%

Top scorer: **Hong Kong SAR**
Most improved: **India**

Hong Kong SAR ranks 1st globally thanks to, among other things, strong property rights (6th), an efficient legal framework and low impact of taxes (2nd).

Price Competitiveness

Regional average
5.6 ▲

Difference from global avg. of 5.3
4.4%

Top scorer: **Brunei Darussalam**
Most improved: **Australia**

Brunei Darussalam ranks 2nd globally thanks to low fuel prices (6th) and ticket taxes and airport charges (14th).

Safety and Security

Regional average
5.4 ▲

Difference from global avg. of 5.3
2.2%

Top scorer: **Hong Kong SAR**
Most improved: **Bangladesh**

Hong Kong SAR ranks 5th globally thanks to minimal impact of crime on business costs (8th), reliable police services (6th) and low homicide (6th) and terrorism rates (1st).

Environmental Sustainability

Regional average
4.0 ▲

Difference from global avg. of 4.3
−7.8%

Top scorer: **New Zealand**
Most improved: **India**

New Zealand ranks 24th globally thanks to low air pollution (5th) and robust environmental regulatory enforcement and stringency (17th), among other things.

Health and Hygiene

Regional average
5.3 ▲

Difference from global avg. of 5.1
4.2%

Top scorer: **Japan**
Most improved: **Indonesia**

Japan ranks 16th globally thanks to the greatest hospital density in the rankings, among other things.

Air Transport Infrastructure

Regional average
3.8 ▲

Difference from global avg. of 3.1
21.1%

Top scorer: **Australia**
Most improved: **Viet Nam**

Australia ranks 2nd globally thanks to high airport density (6th), numerous operating carriers (31st) and substantial route capacity (9th).

Human Resources and Labour Market

Regional average
4.8 ▲

Difference from global avg. of 4.5
6.4%

Top scorer: **Singapore**
Most improved: **Pakistan**

Singapore ranks 5th globally thanks to the world's most qualified workforce (1st) and favorable labour market (10th).

Ground and Port Infrastructure

Regional average
3.9 ▲

Difference from global avg. of 3.5
11.1%

Top scorer: **Hong Kong SAR**
Most improved: **Philippines**

Hong Kong SAR ranks 1st globally thanks to high-quality roads (4th), ports (3rd) and railroads (3rd); paved road density and ground transport efficiency (3rd).

ICT Readiness

Regional average
4.8 ▲

Difference from global avg. of 4.6
5.8%

Top scorer: **Hong Kong SAR**
Most improved: **Nepal**

Hong Kong SAR ranks 1st thanks to the ranking's greatest mobile phone subscription density and network coverage, as well as the best electricity supply quality.

Tourist Service Infrastructure

Regional average
4.0 ▲

Difference from global avg. of 4.0
−1.9%

Top scorer: **Australia**
Most improved: **Korea, Rep.**

Australia ranks 9th globally thanks to good hotel density, high ATM density (6th) and positive perception of its tourism infrastructure quality (16th).

Prioritization of Travel & Tourism

Regional average
4.9 ▲

Difference from global avg. of 4.6
6.4%

Top scorer: **Singapore**
Most improved: **Mongolia**

Singapore ranks 6th globally thanks to government prioritization (10th), spending on T&T (7th) and effectiveness in tourism marketing (7th).

Natural Resources

Regional average
3.6 ▼

Difference from global avg. of 3.1
14.3%

Top scorer: **Australia**
Most improved: **Mongolia**

Australia ranks 3rd globally thanks to numerous natural sites (2nd), extensive wildlife (22nd), total protected areas (13th) and strong digital demand for its natural assets (14th).

International Openness

Regional average
3.7 ▲

Difference from global avg. of 3.3
11.3%

Top scorer: **New Zealand**
Most improved: **Viet Nam**

New Zealand ranks 1st globally thanks to the openness of its air service agreements (1st) and a substantial reduction in visa requirements (27th).

Cultural Resources and Business Travel

Regional average
2.9 ▼

Difference from global avg. of 2.2
29.4%

Top scorer: **China**
Most improved: **India**

China ranks 1st thanks to its numerous stadiums (2nd), cultural and entertainment digital demand (1st) and impressive UNESCO-recognized heritage (3rd).

Asia-Pacific TTCI 2019 Rankings

Global Rank	Economy	Score	DIFFERENCE FROM 2017		SCORE DIFF. FROM BENCHMARK AVG.	
			Rank	Score Growth (%)	Regional (%)	Global (%)
4	Japan	5.4	0.0	2.1	29.1	39.6
7	Australia	5.1	0.0	0.8	23.6	33.6
13	China	4.9	2.0	3.2	17.2	26.7
14	Hong Kong SAR	4.8	−3.0	−1.1	15.7	25.1
16	Korea, Rep.	4.8	3.0	4.7	14.9	24.3
17	Singapore	4.8	−4.0	−2.0	14.4	23.7
18	New Zealand	4.7	−2.0	1.4	14.1	23.4
29	Malaysia	4.5	−3.0	0.4	8.5	17.3
31	Thailand	4.5	3.0	2.6	8.1	16.9
34	India	4.4	6.0	5.7	6.3	14.9
37	Taiwan, China	4.3	−7.0	−3.0	4.1	12.6
40	Indonesia	4.3	2.0	2.8	2.6	11.0
63	Viet Nam	3.9	4.0	3.4	−5.9	1.7
72	Brunei Darussalam	3.8	n/a	n/a	−9.1	−1.7
75	Philippines	3.8	5.0	4.2	−9.8	−2.5
77	Sri Lanka	3.7	−13.0	−2.3	−10.4	−3.2
93	Mongolia	3.5	9.0	4.8	−16.6	−9.8
97	Lao PDR	3.4	−3.0	0.4	−17.9	−11.2
98	Cambodia	3.4	3.0	2.4	−18.4	−11.8
102	Nepal	3.3	2.0	2.3	−19.5	−13.0
120	Bangladesh	3.1	5.0	7.3	−25.5	−19.4
121	Pakistan	3.1	3.0	7.1	−25.6	−19.5

Source: World Economic Forum, 2019.

Asia-Pacific TTCI 2019 Scores

	Global Rank	ENABLING ENVIRONMENT					T&T POLICY & ENABLING CONDITIONS				INFRASTRUCTURE			NATURAL & CULT. RESOURCES	
		Business Environment	Safety & Security	Health & Hygiene	Human Resources & Labor Market	ICT Readiness	Prioritization of T&T	Int'l. Openness	Price Compt'ness.	Environ. Sustainability	Air Transport Infrastructure	Ground & Port Infrastructure	Tourist Service Infrastructure	Natural Resources	Cultural Res. & Business Travel
Japan	4	5.4	6.2	6.4	5.3	6.2	5.3	4.6	4.8	4.4	4.8	6.0	5.7	4.1	6.5
Australia	7	5.1	6.1	6.2	5.1	5.8	5.3	4.9	4.4	4.4	6.0	3.6	6.1	5.5	4.4
China	13	4.7	5.6	5.6	5.2	5.0	4.8	3.1	5.7	3.8	4.3	3.9	3.5	5.1	7.0
Hong Kong SAR	14	6.1	6.4	6.0	5.6	6.6	5.9	3.8	4.5	4.6	5.6	6.4	4.3	3.6	2.4
Korea, Rep.	16	4.8	5.9	6.4	5.0	6.3	4.9	4.3	5.0	4.7	4.6	5.2	5.6	2.4	4.8
New Zealand	18	5.5	6.3	5.9	5.4	6.1	5.6	5.5	4.7	4.7	4.9	3.8	5.8	4.3	2.0
Taiwan, China	37	5.1	6.0	6.0	5.3	5.6	4.7	3.7	5.4	4.4	3.9	5.1	4.8	2.6	2.6
Mongolia	93	4.3	5.6	6.1	4.5	4.3	4.5	1.9	6.2	3.6	2.2	2.2	2.9	3.1	1.9
Eastern Asia-Pacific		**5.1**	**6.0**	**6.1**	**5.2**	**5.7**	**5.1**	**4.0**	**5.1**	**4.3**	**4.5**	**4.5**	**4.8**	**3.8**	**3.9**
Singapore	17	6.0	6.4	5.6	5.6	6.1	6.1	4.8	5.0	4.3	5.5	6.4	5.1	2.2	2.5
Malaysia	29	5.5	5.9	5.3	5.4	5.4	4.8	4.5	6.3	4.0	4.6	4.5	4.5	3.8	2.6
Thailand	31	4.9	4.8	5.0	5.1	5.2	5.2	3.9	5.8	3.6	4.6	3.3	5.9	4.8	2.6
Indonesia	40	4.7	5.4	4.5	4.9	4.7	5.9	4.3	6.2	3.5	3.9	3.3	3.1	4.5	3.2
Viet Nam	63	4.4	5.6	5.0	4.8	4.3	4.1	3.7	5.9	3.8	3.4	3.0	2.8	3.8	2.9
Brunei Darussalam	72	4.8	6.1	5.5	4.6	5.4	3.4	3.7	6.6	4.1	3.3	3.8	4.0	2.4	1.1
Philippines	75	4.3	3.6	4.8	5.0	4.4	4.9	3.5	5.9	4.0	3.2	2.8	3.6	3.8	1.8
Lao PDR	97	4.4	5.3	4.5	4.6	3.4	4.8	3.0	5.9	3.7	2.4	2.5	3.4	2.9	1.3
Cambodia	98	3.8	5.1	4.0	4.2	3.9	5.0	3.5	5.6	3.4	2.3	2.5	3.2	3.0	1.6
South-East Asia Average		**4.8**	**5.3**	**4.9**	**4.9**	**4.8**	**4.9**	**3.9**	**5.9**	**3.8**	**3.7**	**3.6**	**4.0**	**3.5**	**2.2**
India	34	4.9	4.5	4.4	4.5	3.6	4.3	3.8	6.1	3.6	4.2	4.5	2.8	4.5	5.5
Sri Lanka	77	4.4	5.4	5.3	4.4	3.9	5.2	2.7	5.4	4.0	2.8	3.7	3.3	3.6	1.7
Nepal	102	4.0	5.2	4.3	4.4	3.5	5.0	2.7	6.0	3.5	2.3	2.0	2.2	3.9	1.3
Bangladesh	120	4.2	4.9	4.5	3.8	3.4	3.6	2.5	5.3	3.8	2.0	3.5	1.9	2.3	1.6
Pakistan	121	4.2	3.7	4.5	3.4	3.0	3.6	2.2	5.7	3.6	2.2	3.3	2.7	2.3	1.9
South Asia Average		**4.3**	**4.7**	**4.6**	**4.1**	**3.5**	**4.3**	**2.8**	**5.7**	**3.7**	**2.7**	**3.4**	**2.6**	**3.4**	**2.4**
ASIA-PACIFIC AVERAGE		**4.8**	**5.4**	**5.3**	**4.8**	**4.8**	**4.9**	**3.7**	**5.6**	**4.0**	**3.8**	**3.9**	**4.0**	**3.6**	**2.9**

Bottom 20% Top 20%

Asia-Pacific Regional Analysis

Overview

As the fastest-growing T&T region, Asia-Pacific continues to increase in importance for the global industry. In 2017, it was both the second-largest destination for international visitors and boasted the second-largest volume of international tourist receipts. Moreover, the region is the biggest source of global outbound tourist spending, with most of this spent on intraregional travel. Based on GDP figures, Asia-Pacific also has the largest aggregate domestic travel market. Consequently, for many local countries it has become crucial to remain competitive within the region to attract growing international arrivals, contend with domestic T&T offerings of regional rivals and take advantage of their own growing domestic markets. Since the last edition of the report, Asia-Pacific trails only Europe in terms of TTCI score and rate of score improvement.

In addition to a rapidly growing middle class, Asia-Pacific can rely on a robust balance of natural and cultural resources to generate tourism: the region boasts the TTCI's second-best score for the former and top score for the latter. The region also continues to improve its above-average level of international openness and T&T prioritization, indicating a strong commitment to trade and travel by many Asia-Pacific countries. Moreover, the growing number of international and domestic travellers are supported by, and drive, the world's largest and still rapidly expanding aviation market. As a result, one of the region's greatest leads over the global average comes from its air transport infrastructure. Asia-Pacific also scores above the global averages for ground and port infrastructure as well as all the pillars of the Enabling Environment subindex. Much of this specific competitiveness performance is concentrated in Eastern Asia-Pacific and to a lesser degree South-East Asia, while South Asia leads in terms of overall improvement growth.

Despite Asia-Pacific's many strengths, the region does face several challenges. Although tourist service infrastructure has become more developed, most Asia-Pacific countries outside of the Eastern Asia-Pacific subregion still have more room to improve in this area to meet the global benchmarks. More importantly, environmental sustainability remains the region's greatest competitiveness constraint. Many countries suffer from high air pollution, water stress, below-average levels of wastewater treatment, endangered wildlife and forest loss. Nevertheless, there has been some progress made on this front as more environmental treaties have been ratified, helping the average Environmental Sustainability pillar score to climb. Notably, a significant portion of this growth in score came from new data related to fish stock status, which provides a more up-to-date measure of marine health, but as such reduces the ability to directly compare this pillar between 2017 and 2019 performance. Furthermore, increasingly accurate statistics show that, on average, the region is not protecting as much of its natural assets as previously thought. If the region manages to balance expanding tourism demand with environmental and developmental sustainability it will continue to improve its competitiveness. In the ten years to 2029, the World Travel and Tourism Council forecasts that regional countries covered by this year's TTCI will increase their T&T GDP by nearly 80%, accounting for over half of the global growth.[*]

Subregion Analysis

Eastern Asia-Pacific is the most competitive subregion in Asia-Pacific by far and the second-most competitive in the world. Furthermore, the subregion acts as the engine of T&T in Asia-Pacific, accounting for over half of the parent region's international tourist arrivals and receipts and most of its outbound spending. Eastern Asia-Pacific's greatest advantage relative to both the regional and global averages comes from its well-developed cultural and—to a lesser extent—natural resources. As one of the world's economic centres, with a particularly strong dependence on trade and globalization, the subregion provides exceptional connectivity. It includes some of the world's best air, ground, port and ICT infrastructures. Travel is further bolstered by high degrees of T&T prioritization and international openness. Among all the subregion's covered in this report, Eastern Asia-Pacific witnessed the fastest improvements (by percentage rate) to its tourist service infrastructure score, and is home to almost all the wider region's above-

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global average scorers for this category. In addition, since most of Asia-Pacific's high-income economies are located here, the Eastern Asia-Pacific consistently leads regional competitors on business environment, human resource and labour market, safety and security and health and hygiene performance. Nevertheless, while exceeding the broader regional scores for environmental sustainability, it scores at about the global average. Finally, the subregion remains fairly expensive, dissuading potential visitors.

Six of the subregion's eight economies covered in the report have improved their T&T competitiveness since 2017. **Mongolia** experienced the greatest improvement in score (by percentage), moving up nine spots to rank 93rd globally. The country showed improvement on most pillars; it has Eastern Asia-Pacific's strongest rate of growth for health and hygiene (50th to 38th), T&T prioritization (102nd to 85th) and natural (79th to 62nd) and cultural (62nd to 59th) resources. At the same time, Mongolia remains the subregion's least competitive country, requiring more improvements to business environment (83rd), ICT readiness (85th), international openness (128th), environmental sustainability (131st) infrastructure (111th) and natural and cultural resources. **Taiwan, China** had the subregion's largest decline in competitiveness (30th to 37th), due to significantly tightened visa requirements (37th to 119th), waning cultural resources and business travel (26th to 36th) and recalibrated figures showing a drastic reduction in protected areas (20th to 118th). **Japan** remains the subregion's top scorer, ranking 4th globally thanks to its rich natural (25th) and cultural (5th) resources, overall infrastructure (8th), T&T prioritization (23rd), international openness (6th) and enabling environment (10th). Meanwhile, **China** (13th) is Eastern Asia-Pacific's largest T&T economy, accounting for over one-half of the subregion's T&T GDP.* The country has the index's best score for the Natural and Cultural resources subindex but faces hurdles on Environmental Sustainability (120th).

South-East Asia outscores the global average in overall competitiveness. The subregion depends on T&T more than any other subregion for its GDP, with a particular emphasis on international arrivals versus domestic tourism. Many visitors are attracted to the subregion's combination of rich natural resources and price competitiveness, with the latter being its greatest advantage relative to other countries in the broader Asia-Pacific region. It's no surprise, then, that, given this importance of tourism, the subregion outscores the global *and* Asia-Pacific scores for T&T prioritization and international openness. In addition, the subregion's above-average air transport infrastructure continues to improve at a rapid pace, especially in regard to the number of operating airlines and route capacity. On the other hand, South-East Asia still trails global and regional means for tourism services infrastructure. Most—but not all—of the subregion's economies also score lower for ground and port infrastructure, hindering travel. Enabling Environment scores—and the Health and Hygiene pillar in particular—should continually be enhanced in order to compete with Eastern Asia-Pacific. Yet this subregion's greatest

weakness relative to the global average is environmental sustainability, which has been impacted by deforestation, an increasing number of threatened species and insufficient wastewater treatment. Consequently, the subregion's natural assets are under threat, with the scores on this pillar declining over the past two years due to new data showing less habitat protection than previously believed.

Seven of the subregion's nine economies improved their T&T competitiveness since the last edition of the report. **The Philippines** had the fastest rate of improvement, moving up four places to rank 75th globally. The country showed impressive improvement on overall infrastructure (90th to 80th) and ICT readiness (86th to 82nd), but still faces challenges when it comes to safety and security (135th). On the other hand, **Singapore** had the greatest percentage decline in score (losing four places) but remains the subregion's most competitive T&T country, ranking 17th globally. It has a world-class business environment (2nd), human resources and labour market (5th), ICT readiness (15th), safety and security (6th), T&T policy and conditions (2nd) and overall infrastructure (3rd). Despite this, Singapore dropped from first to third for international openness, due to increased visa requirements (16th to 50th) and a drop in scores for its natural (103rd to 120th) and cultural resources (28th to 38th). **Cambodia** (98th) remains the lowest scorer in South-East Asia, trailing the subregion on the Enabling Environment (106th) and Infrastructure (101st) subindexes. **Thailand** (31st) has South-East Asia's largest T&T GDP, which is reinforced by some of Asia-Pacific's most attractive natural resources (10th) and most efficient tourist services infrastructure (14th).

South Asia is the only subregion in Asia-Pacific to score below the global average for T&T competitiveness. Its strongest advantage relative to the global average comes from its price competitiveness and natural and cultural resources, yet it trails Asia-Pacific on the latter two pillars and the global index on all other pillars. South Asia ranks low for infrastructure, with underdeveloped tourist service infrastructure representing its greatest relative disadvantage. Low ICT readiness, international openness, safety and security and health and hygiene are other key weaknesses. However, South Asia also experienced one of the fastest rates of improvement since the last edition of the report, including the greatest subregion percentage jump in scores on ICT readiness.

Four of the five subregion's economies improved their T&T competitiveness over the past two years. **Bangladesh** had the world's greatest percentage improvement on its overall TTCI score, helping it move up five spots to rank 120th globally. The country enhanced its safety and security (123rd to 105th), ICT readiness (116th to 111th), T&T prioritization (127th to 121st), price competitiveness (89th to 85th), ground and port infrastructure (74th to 60th) scores at double-digit rates. Environmental sustainability also increased (128th to 116th), but much of the growth came from an improvement in indicators measuring marine

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* World Travel & Tourism Council, Tourism Satellite Account Research, latest year available.

sustainability. However, **India,** which accounts for the majority of South Asia's T&T GDP, remains the subregion's most competitive T&T economy, moving up six places to rank 34th globally. From a subregional perspective, the nation has better air (33rd) and ground and port infrastructure (28th), international openness (51st) and natural (14th) and cultural resources (8th). Compared to global benchmarks, the country can also add price competitiveness (13th) to its roster of strengths. However, India still needs to enhance its enabling environment (98th), tourist service infrastructure (109th) and environmental sustainability (128th). **Sri Lanka** is the only country to decrease in competitiveness (64th to 77th) in South Asia due to falls on business environment (50th to 79th), international openness (67th to 100th) and natural resources (31st to 43rd). In particular, increased visa requirements (16th to 50th) have hindered openness, while natural area protection numbers show a lower percentage of territorial coverage (39th to 112th), reducing the advantage of natural assets. **Pakistan** (121st) remains the least competitive country in South Asia when it comes to T&T, including the region's least favourable safety and security (134th) conditions.

Selected Country/Economy Analysis

Japan remains Asia-Pacific's most competitive T&T economy, ranking 4th globally. While the country's large economy provides it with an expansive domestic market, the nation has recently witnessed a boom in international tourist arrivals and receipts. Over the years, the T&T industry remains a priority (23rd), with increased government funding (42nd) and more effective marketing campaigns (26th). Moreover, Japan continues to become more open (10th to 6th) to international visitors and business. As travel barriers continue to drop, visitors are attracted to its unique cultural resources (5th)—the country's greatest advantage relative to the regional and global averages. The country scores high for aggregate cultural and intangible heritage (7th), and its abundance of sports stadiums (3rd) help Japan position itself for upcoming international sporting and other events. Additionally, the country's central position within the global economy guarantees numerous international association meetings (7th).

International and domestic travel is made easy by continued improvements to already well-developed air transport (19th) and tourist services (29th to 19th) infrastructure. Revisions to road density data also shows Japan's ground and port infrastructure—already recognized for ground transport efficiency (1st)—to be even more developed than previously thought. Online and in-person travel services are also bolstered by good ICT readiness (10th) and exceptional customer orientation (2nd). However, Japan still has room to better utilize its promising natural resources (25th). Improved area protection data shows that the nation could yet do more to expand habitat protection (76th), which is critical given Japan's high number of threatened species (132nd) and global rank of 97th for fish stock pressure (a new indicator for measuring fishing of overexploited or collapsed fish stocks). Yet the country's greater

commitment to environmental treaties (31st to 17th) does show the potential to improve sustainability in the future. Lastly, Japan can further enhance its competitiveness by continuing to improve its price competitiveness (113th), which is characterized by low purchasing power (128th).

China is by far the largest T&T economy in Asia-Pacific and the 13th most competitive globally (up two spots from 2017). It welcomes more international visitors than any other country in the region and its T&T industry benefits from a large and growing domestic market. The cornerstone of China's competitiveness is its exceptional natural resources (4th) as well as the TTCI's highest score for cultural resources. The nation has the greatest number of UNESCO Natural World Heritage sites in the world as well as impressive wildlife (6th). It also ranks first on intangible heritage and cultural and entertainment digital demand, second for sports stadiums and eight for business events. Fairly low hotel prices (25th) and reduced ticket taxes (58th to 35th) help minimize the cost of staying and traveling within and to China. Moreover, travel is facilitated by an extensive list of air carriers (7th) that have produced the second-largest airline capacity in the world. Intra-country travel is also made easier by one of the world longest railway networks, which gets relatively positive marks for quality (17th) and efficiency (25th). However, given China's future tourism potential and needs, more investment needs to be diverted to enhancing the quality of roads (42nd), airports (53rd) and ports (55th).

Comparatively low and declining prioritization of T&T (50th to 66th), unfavourable international openness (76th), characterized by strict visa requirements (132nd), and underdeveloped tourist service infrastructure (86th) also create hurdles for potential visitors (although gains have been made in tourist service infrastructure). Further, despite improvement, China still scores low for environmental sustainability (120th). The country faces several environmental challenges, including very high air pollution (136th to 137th), deforestation (52nd to 53rd), endangered wildlife (120th to 122nd), depleting water resources (55th to 67th) and continued insufficient wastewater treatment. Unsurprisingly, despite its impressive natural resources, the degree to which people travel to China for nature-based tourism is below average and decreasing (89th to 95th). Similarly, potential visitors might also be worried about China's health and hygiene (62nd) and safety and security (59th) conditions, though significant progress has been made to both. A strong human resource and labour market (24th), combined with gains on business environment (92nd to 53rd) and ICT readiness (64th to 58th) do bode well for T&T investment and the related online ecosystem.

Bangladesh witnessed the greatest percentage increase in T&T competitiveness in the world, allowing it to move up five places in the rankings. While much of the growth is due to a low starting base (the country still ranks 120th globally) it also indicates the nation's high potential for upward mobility. The country ranks just above average for the total number of known species (49th) and oral and intangible cultural heritage (43rd), which indicates potential for natural and cultural tourism and might explain the rapid rise in international arrivals. Though it still requires substantial

enhancement, the country's growth in tourism also coincides with improvements on elements that have traditionally hindered travel. The most significant improvement came from safety and security (123rd to 105th), which has been a major concern in previous years. Increasingly favourable perceptions of government commitment to the T&T industry (111th to 109th) and country brand strategy ratings (97th to 77th) has also contributed to a greater prioritization of T&T (127th to 121st). Additionally, enhanced ICT readiness (116th to 111th) and better overall infrastructure (115th to 109th) are likely to make Bangladesh more conducive for travel.

At the same time, international openness has actually declined (104th to 114th), due to increased visa requirements (46th to 53rd), while tourist services infrastructure (133rd) remains the country's greatest disadvantage relative to the global average. To continue improving its T&T competitiveness, Bangladesh could further cut red tape. For instance, the country scores substantially lower than the Asia-Pacific average for time required to deal with construction permits (129th). Improving this indicator could push forward recent gains on business environment (104th to 94th), encouraging investment in T&T. Furthermore, investment barriers could be reduced and travel services enhanced by improving human resources and the soundness of the labour market (120th), which would need to include increasing female labour participation (128th) and further work on labour force qualification (107th). Expanding total protected areas (102nd) could help preserve threatened wildlife (112th), reduce rising deforestation (43rd to 60th) and enhance Bangladesh's utilization of natural assets for tourism. In fact, the nation's nature tourism is also threated by lax environmental regulations and enforcement (105th), and overall attractiveness of the country is held back by severe air pollution (140th) and a lack of wastewater treatment.

Europe and Eurasia

Average score 4.3

Difference from global avg. of 3.8 11.1%

Travel & Tourism Competitiveness Index 2019

Key Indicators

International tourist arrivals (thousands) 661,510.9
International tourism inbound receipts (US$ millions) 510,671.9
Average receipts per arrival (US$) 772.0
T&T industry GDP (US$ millions) 832,402.3
  % of total *3.6%*

Domestic spending (share of internal T&T spending) 64.9%
Visitor spending (share of internal T&T spending) 35.1%
T&T industry employment (thousands) 14,959.3
  % of total *3.9%*

Europe and Eurasia Pillar Performance Overview, 2019
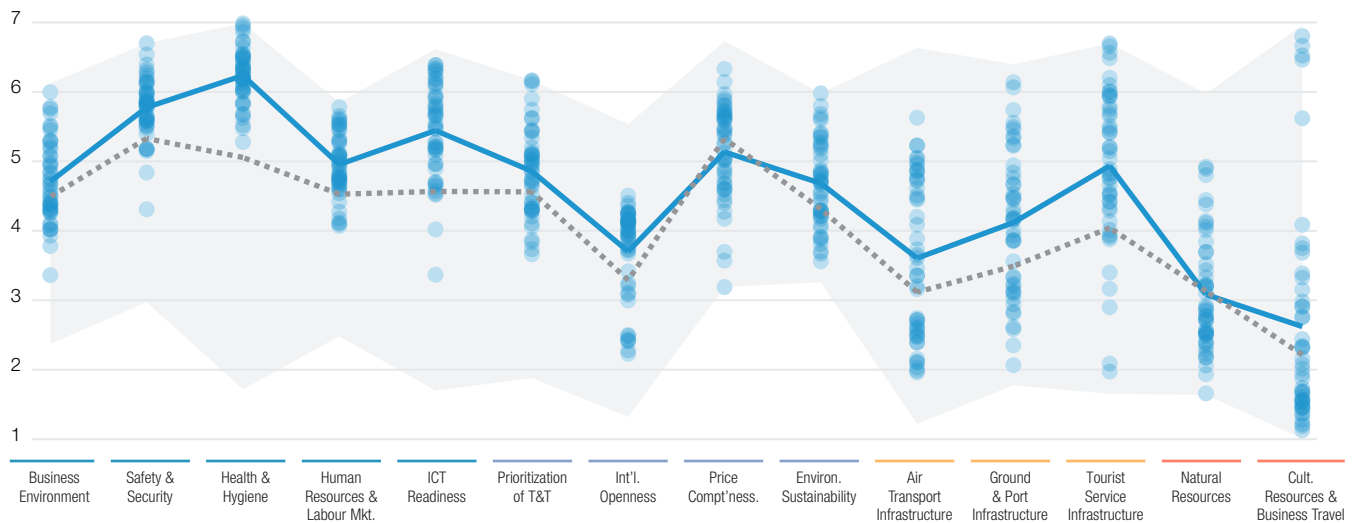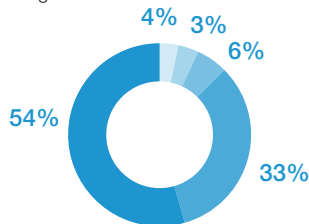
T&T GDP
subregion share

4% 3%
6%
54%
33%

International tourist arrivals
subregion share

10%
8%
6%
38%
37%

T&T employment
subregion share

8%
11%
4%
50%
27%
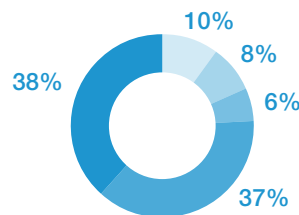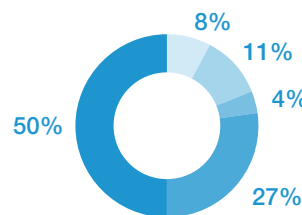
- Balkans and Eastern Europe
- Eurasia
- Northern Europe
- Southern Europe
- Western Europe

Europe and Eurasia Travel & Tourism Competitiveness Index Score by Country/Economy, 2019

European and Eurasian average

Global average

ES FR DE GB IT CH AT PT NL NO DK SE LU BE GR IE HR FI IS MT SI CZ RU PL TR CY BG EE HU LV RO LT SK ME GE AZ UA AM KZ RS AL MK MD TJ BA KG

- Balkans and Eastern Europe
- Eurasia
- Northern Europe
- Southern Europe
- Western Europe
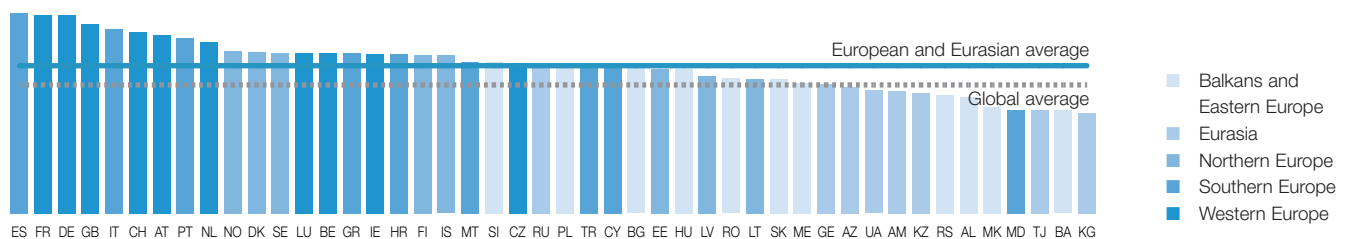
Regional Highlights

- World's leading and most competitive T&T region, with exceptional cultural resources and leading positions on almost all pillars.
- World's most-improved region since 2017, with Eurasia as well as the Balkans and Eastern Europe subregions leading the way.
- Strongest improvements come from the ICT Readiness, Price Competitiveness and Air Transport Infrastructure pillars.

Note: See page 13 for sources and more explanation on how to read the Regional Profiles.

Europe and Eurasia Pillar Snapshot

Business Environment

Regional average
4.7 ▲

Difference from global avg. of 4.5
4.8%

Top scorer: **Switzerland**
Most improved: **Azerbaijan**

Switzerland ranks 3rd globally thanks to strong property rights (2nd), an efficient legal framework, competitive markets (1st) and low impact of taxes (5th).

Safety and Security

Regional average
5.8 ▲

Difference from global avg. of 5.3
8.4%

Top scorer: **Finland**
Most improved: **Ukraine**

Finland ranks 1st for safety and security thanks to minimal impact of crime (2nd) and terrorism (2nd) on business costs, as well as reliable police services (1st).

Health and Hygiene

Regional average
6.2 ▲

Difference from global avg. of 5.1
23.3%

Top scorer: **Austria**
Most improved: **Austria**

Austria ranks 1st globally thanks to comprehensive physician density (2nd) and exceptional hospital density.

Human Resources and Labour Market

Regional average
5.0 ▼

Difference from global avg. of 4.5
9.5%

Top scorer: **Switzerland**
Most improved: **Montenegro**

Switzerland ranks 2nd globally thanks to a highly qualified workforce (4th) and favourable labour market (2nd).

ICT Readiness

Regional average
5.4 ▲

Difference from global avg. of 4.6
19.2%

Top scorer: **Denmark**
Most improved: **Tajikistan**

Denmark ranks 2nd globally thanks to a high density of fixed (3rd) and mobile (10th) broadband internet subscriptions, and extensive mobile network coverage (1st).

Prioritization of Travel & Tourism

Regional average
4.9 ▲

Difference from global avg. of 4.6
6.5%

Top scorer: **Malta**
Most improved: **Turkey**

Malta ranks 1st globally thanks to government prioritization (4th), spending on T&T (5th) and effectiveness in tourism marketing (17th).

International Openness

Regional average
3.7 ▲

Difference from global avg. of 3.3
12.6%

Top scorer: **Ireland**
Most improved: **Moldova**

Ireland ranks 9th globally, thanks to relatively open air service agreements (16th) and quantity of trade agreements (1st).

Price Competitiveness

Regional average
5.1 ▲

Difference from global avg. of 5.3
−3.6%

Top scorer: **Kazakhstan**
Most improved: **Switzerland**

Kazakhstan ranks 4th globally thanks to reduced hotel (17th) and fuel (13th) prices, greater purchasing power (23rd) and low ticket taxes and airport charges (6th).

Environmental Sustainability

Regional average
4.7 ▲

Difference from global avg. of 4.3
8.6%

Top scorer: **Switzerland**
Most improved: **Malta**

Switzerland ranks 1st globally thanks to, among other things, good wastewater treatment and environmental regulatory enforcement and stringency (2nd).

Air Transport Infrastructure

Regional average
3.6 ▲

Difference from global avg. of 3.1
15.7%

Top scorer: **Norway**
Most improved: **Denmark**

Norway ranks 5th globally thanks to quality of air transport infrastructure (19th), high airport density (4th) and the number of operating carriers (28th).

Ground and Port Infrastructure

Regional average
4.1 ▲

Difference from global avg. of 3.5
18.0%

Top scorer: **Netherlands**
Most improved: **Cyprus**

The Netherlands ranks 3rd globally thanks to high-quality roads (3rd), ports (1st) and railroads (7th); paved road density and ground transport efficiency (8th).

Tourist Service Infrastructure

Regional average
4.9 ▲

Difference from global avg. of 4.0
22.1%

Top scorer: **Portugal**
Most improved: **Georgia**

Portugal ranks 1st globally thanks to exceptional hotel density, high ATM density (4th) and high-quality tourism infrastructure (5th).

Natural Resources

Regional average
3.1 ▲

Difference from global avg. of 3.1
−1.5%

Top scorer: **France**
Most improved: **Albania**

France ranks 6th globally thanks to numerous natural heritage sites (13th), total protected areas (9th) and digital demand for natural assets (10th).

Cultural Resources and Business Travel

Regional average
2.6 ▲

Difference from global avg. of 2.2
18.4%

Top scorer: **France**
Most improved: **Russian Federation**

France ranks 2nd globally thanks to cultural digital demand (3rd), numerous international meetings (5th) and many cultural sites (4th) and listings (5th).

Europe and Eurasia TTCI 2019 Rankings

Global Rank	Economy	Score	DIFFERENCE FROM 2017		SCORE DIFF. FROM BENCHMARK AVG.	
			Rank	Score Growth (%)	Regional (%)	Global (%)
1	Spain	5.4	0.0	0.3	27.3	41.4
2	France	5.4	0.0	1.5	26.5	40.4
3	Germany	5.4	0.0	2.0	26.1	40.0
6	United Kingdom	5.2	−1.0	−0.2	21.5	34.9
8	Italy	5.1	0.0	1.9	19.0	32.2
10	Switzerland	5.0	0.0	1.5	17.4	30.4
11	Austria	5.0	1.0	2.0	15.9	28.8
12	Portugal	4.9	2.0	3.2	14.5	27.2
15	Netherlands	4.8	3.0	3.2	12.1	24.5
20	Norway	4.6	−3.0	−1.4	7.5	19.4
21	Denmark	4.6	10.0	3.4	7.2	19.1
22	Sweden	4.6	−2.0	0.2	6.8	18.6
23	Luxembourg	4.6	5.0	1.4	6.6	18.4
24	Belgium	4.5	−3.0	0.1	6.4	18.2
25	Greece	4.5	0.0	0.9	6.4	18.1
26	Ireland	4.5	−3.0	0.3	6.2	18.0
27	Croatia	4.5	5.0	2.4	5.9	17.6
28	Finland	4.5	5.0	2.7	5.7	17.4
30	Iceland	4.5	−6.0	−0.4	5.3	17.0
35	Malta	4.4	1.0	1.9	2.0	13.3
36	Slovenia	4.3	5.0	3.9	1.7	13.0
38	Czech Republic	4.3	1.0	2.5	1.3	12.5
39	Russian Federation	4.3	4.0	4.0	1.0	12.2
42	Poland	4.2	4.0	3.1	−1.0	10.0
43	Turkey	4.2	1.0	2.0	−1.2	9.8
44	Cyprus	4.2	4.0	3.6	−1.3	9.6
45	Bulgaria	4.2	0.0	1.8	−1.4	9.5
46	Estonia	4.2	−9.0	−0.7	−1.8	9.1
48	Hungary	4.2	2.0	3.4	−1.9	9.0
53	Latvia	4.0	1.0	1.8	−5.4	5.0
56	Romania	4.0	12.0	5.7	−6.6	3.7
59	Lithuania	4.0	−3.0	1.5	−7.0	3.3
60	Slovak Republic	4.0	−2.0	2.0	−7.0	3.3
67	Montenegro	3.9	5.0	5.6	−8.9	1.1
68	Georgia	3.9	2.0	4.7	−9.3	0.7
71	Azerbaijan	3.8	0.0	2.7	−11.1	−1.3
78	Ukraine	3.7	10.0	6.5	−12.9	−3.2
79	Armenia	3.7	5.0	5.2	−13.2	−3.6
80	Kazakhstan	3.7	2.0	2.2	−14.1	−4.6
83	Serbia	3.6	12.0	7.2	−15.1	−5.7
86	Albania	3.6	12.0	6.9	−16.1	−6.8
101	North Macedonia	3.4	−12.0	−3.8	−21.4	−12.7
103	Moldova	3.3	14.0	6.4	−23.0	−14.5
104	Tajikistan	3.3	2.0	2.4	−23.1	−14.6
105	Bosnia and Herzegovina	3.3	8.0	5.2	−23.2	−14.7
110	Kyrgyz Republic	3.2	5.0	4.1	−24.4	−16.0

Source: World Economic Forum, 2019.

Europe and Eurasia TTCI 2019 Scores

	Global Rank	ENABLING ENVIRONMENT					T&T POLICY & ENABLING CONDITIONS				INFRASTRUCTURE			NATURAL & CULT. RESOURCES	
		Business Environment	Safety & Security	Health & Hygiene	Human Resources & Labor Market	ICT Readiness	Prioritization of T&T	Int'l. Openness	Price Compt'ness.	Environ. Sustainability	Air Transport Infrastructure	Ground & Port Infrastructure	Tourist Service Infrastructure	Natural Resources	Cultural Res. & Business Travel
Spain	1	4.5	6.1	6.2	4.9	5.8	5.9	3.9	5.0	4.7	5.0	5.2	6.6	4.8	6.7
Italy	8	4.0	5.5	6.3	4.6	5.5	4.8	4.1	4.4	4.3	4.4	4.7	6.0	4.9	6.5
Portugal	12	4.7	6.3	6.0	5.1	5.5	5.7	4.2	5.1	4.2	4.7	4.2	6.7	4.0	4.1
Greece	25	3.9	5.6	6.5	4.7	5.2	5.6	4.1	4.9	4.5	4.8	3.8	5.8	3.5	3.3
Croatia	27	3.8	5.9	6.3	4.1	5.2	4.9	4.2	5.0	5.1	3.6	3.9	6.5	4.4	2.8
Malta	35	5.0	6.0	6.5	4.8	5.8	6.2	4.0	4.9	4.7	3.9	4.8	5.5	2.8	1.5
Turkey	43	4.4	4.3	5.5	4.2	4.6	5.1	3.8	5.6	3.7	4.7	3.6	5.0	2.8	3.8
Cyprus	44	4.9	5.9	5.7	5.1	5.9	6.2	3.8	4.8	3.9	3.7	4.4	5.7	2.5	1.7
Southern Europe Average		**4.4**	**5.7**	**6.1**	**4.7**	**5.4**	**5.5**	**4.0**	**5.0**	**4.4**	**4.4**	**4.3**	**6.0**	**3.7**	**3.8**
France	2	4.8	5.7	6.5	5.1	5.9	5.1	4.2	4.5	5.3	4.8	5.6	5.7	4.9	6.8
Germany	3	5.4	5.8	7.0	5.7	6.0	5.0	4.3	4.6	5.3	4.9	5.7	5.9	4.1	6.5
United Kingdom	6	5.8	5.8	5.8	5.5	6.2	4.9	4.2	3.2	5.2	5.2	5.4	6.1	4.4	5.6
Switzerland	10	6.0	6.4	6.5	5.8	6.3	5.6	4.1	3.7	6.0	5.0	6.1	6.2	3.7	2.8
Austria	11	4.8	6.2	7.0	5.3	6.1	5.3	4.0	4.7	5.7	4.2	5.2	6.7	4.1	3.2
Netherlands	15	5.5	6.0	6.3	5.6	6.3	4.8	4.3	4.6	5.4	5.2	6.1	4.8	2.7	3.4
Luxembourg	23	5.8	6.3	6.2	5.4	6.2	5.1	4.3	5.0	5.6	3.7	5.5	5.9	2.8	1.6
Belgium	24	4.8	5.7	6.5	5.3	5.8	4.4	4.1	4.8	4.8	4.1	5.5	5.2	2.5	3.7
Ireland	26	5.2	6.0	5.8	5.3	5.7	5.5	4.5	4.6	4.9	4.5	4.5	5.8	2.6	2.9
Czech Republic	38	4.5	6.1	6.9	4.9	5.7	4.3	4.2	5.4	5.0	3.4	4.9	5.2	2.5	2.4
Western Europe Average		**5.3**	**6.0**	**6.5**	**5.4**	**6.0**	**5.0**	**4.2**	**4.5**	**5.3**	**4.5**	**5.4**	**5.8**	**3.4**	**3.9**
Norway	20	5.3	6.1	6.4	5.5	6.3	5.4	4.0	4.2	5.8	5.6	3.9	5.1	3.2	2.2
Denmark	21	5.5	5.8	6.2	5.6	6.4	4.7	4.4	4.4	5.4	4.5	5.3	4.8	3.3	2.3
Sweden	22	5.3	5.9	6.2	5.5	6.4	4.5	4.1	4.3	5.2	5.0	4.7	4.8	3.2	2.9
Finland	28	5.7	6.7	6.4	5.5	6.1	5.0	4.1	4.7	5.6	4.9	4.5	4.7	2.9	2.0
Iceland	30	5.3	6.5	6.2	5.6	6.3	6.1	4.4	3.6	4.8	5.0	4.0	6.0	3.1	1.5
Estonia	46	5.1	6.2	6.3	5.1	6.1	5.4	3.7	5.4	5.2	2.5	4.5	5.4	2.4	1.6
Latvia	53	4.6	5.8	6.4	5.0	5.7	4.6	4.0	5.7	4.7	3.5	4.2	4.5	2.4	1.4
Lithuania	59	4.7	5.9	6.9	5.1	5.6	4.3	4.0	5.7	4.6	2.5	4.3	4.4	2.3	1.4
Northern Europe Average		**5.2**	**6.1**	**6.4**	**5.4**	**6.1**	**5.0**	**4.1**	**4.7**	**5.2**	**4.2**	**4.4**	**5.0**	**2.9**	**1.9**
Slovenia	36	4.3	6.1	6.2	4.9	5.5	5.1	3.7	5.1	5.4	2.6	4.8	5.4	4.1	1.7
Poland	42	4.3	5.6	6.3	4.8	5.5	4.2	4.1	5.7	4.2	3.2	4.3	4.5	3.2	3.0
Bulgaria	45	4.4	5.2	6.7	4.6	5.2	4.7	3.9	5.7	4.8	2.7	3.2	6.0	3.7	2.1
Hungary	48	4.3	5.8	6.6	4.6	5.3	5.1	4.2	5.3	4.8	3.4	4.2	4.8	2.7	2.3
Romania	56	4.4	6.0	6.1	4.5	5.2	4.1	3.9	5.6	4.4	2.7	3.1	4.6	3.2	2.3
Slovak Republic	60	4.1	5.6	6.2	4.7	5.7	4.3	3.9	5.4	4.7	2.0	4.2	4.4	3.4	1.6
Montenegro	67	4.6	5.6	5.8	4.8	5.2	5.0	2.4	5.6	4.7	3.2	3.3	5.5	2.7	1.1
Serbia	83	4.4	5.5	6.3	4.7	5.1	3.9	3.2	5.5	4.5	2.6	3.0	3.9	2.1	1.7
Albania	86	4.0	5.8	5.3	5.1	4.7	5.0	2.4	5.3	4.3	2.1	3.1	4.0	2.9	1.2
North Macedonia	101	4.3	5.2	6.0	4.1	4.7	3.7	2.3	5.8	3.6	2.4	2.6	3.9	2.2	1.4
Moldova	103	4.0	5.5	6.1	4.4	4.6	3.7	3.1	5.0	4.3	2.1	2.6	2.9	1.7	1.2
Bosnia and Herzegovina	105	3.4	5.4	5.6	4.1	4.5	4.1	2.4	5.5	4.3	2.0	2.4	3.9	1.9	1.5
Balkans & Eastern Europe Average		**4.2**	**5.6**	**6.1**	**4.6**	**5.1**	**4.4**	**3.3**	**5.5**	**4.5**	**2.6**	**3.4**	**4.5**	**2.8**	**1.8**
Russian Federation	39	4.3	5.1	6.7	5.0	5.3	4.4	2.2	5.8	4.2	4.6	3.3	4.1	3.8	3.7
Georgia	68	5.2	6.0	6.0	4.7	4.9	5.2	3.4	5.7	4.2	2.5	3.2	4.9	2.4	1.5
Azerbaijan	71	5.1	5.9	6.1	5.3	5.0	5.0	3.1	5.9	4.1	2.6	3.9	3.2	2.2	1.9
Ukraine	78	4.1	4.8	6.5	4.8	4.5	4.3	3.7	5.9	3.9	2.7	3.1	4.3	2.2	1.9
Armenia	79	5.0	5.8	6.0	4.8	4.7	4.7	3.2	5.7	4.0	2.4	2.8	4.3	2.5	1.4
Kazakhstan	80	4.7	5.6	6.5	4.7	5.0	4.3	2.5	6.3	3.6	2.7	2.9	3.4	2.6	1.7
Tajikistan	104	4.3	5.6	5.5	4.7	3.4	4.3	2.5	5.6	3.9	2.2	2.8	2.0	2.9	1.3
Kyrgyz Republic	110	4.4	5.2	5.7	4.3	4.0	3.8	3.0	6.1	3.7	2.0	2.1	2.1	2.5	1.5
Eurasia Average		**4.6**	**5.5**	**6.1**	**4.8**	**4.6**	**4.5**	**3.0**	**5.9**	**4.0**	**2.7**	**3.0**	**3.5**	**2.6**	**1.9**
EUROPE AND EURASIA AVERAGE		**4.7**	**5.8**	**6.2**	**5.0**	**5.4**	**4.9**	**3.7**	**5.1**	**4.7**	**3.6**	**4.1**	**4.9**	**3.1**	**2.6**

Bottom 20%   Top 20%

Europe and Eurasia Regional Analysis

Overview

Europe and Eurasia remains the world's most competitive region when it comes to T&T; it outscores the global average score on nearly all pillars and includes six of the top 10 scorers on the TTCI. By leveraging its superior competitiveness, the region is able to maintain the largest T&T export economy in the world, accounting for half the international tourist arrivals and over 40% of international receipts of economies ranked in this edition of the report. Moreover, despite its maturity, Europe's improvement in T&T competitiveness over 2017 actually outpaced all other regions.

One of the key drivers of Europe's success as a travel destination is its abundant cultural resources, which are concentrated primarily in Southern and Western Europe. The large number of visitors that these assets attract are accommodated by the world's most robust tourism infrastructure, with a particularly high level of hotel density. After a slowdown in receipts in 2015 and 2016, the region's economies refocused on T&T, demonstrated by climbing T&T prioritization scores. Europe's high degree of market, regulatory and travel policy integration centered on the European Union and the Schengen Area also reinforces intra-regional travel, which accounts for the vast majority of its international arrivals. Unsurprisingly, members of these pacts have very similar performances on international openness, outscoring the global average.

Travel throughout the region is also bolstered by world-class infrastructure. Air transport, which accounts for over half the region's arrivals, has greatly improved as an uptick in travel in recent years has led to an increase in the number of air carriers and route capacity. Europe's high concentration of airports and airlines also helps increase competition, thereby driving down airport and ticket prices, improving otherwise relatively low price competitiveness for much of the region. The compact geography of Europe (excluding Eurasia) also makes it ideal for ground transport, which includes high road and railroad density. In addition, regional economic integration, infrastructure and economic heft fuels significant business travel, with Europe hosting more international meetings than the rest of the world combined.

Many European economies (especially in Northern and Western Europe) also have strong enabling environments,

with high marks on areas related to their business environment and labour markets. Moreover, with all of Europe's nations scoring above the global average for health and hygiene and nearly all for safety and security, travellers can traverse much of the region with little concern for personal wellbeing. Europe's high degree of ICT readiness allows T&T business and travellers to leverage increased use of online and digital platforms in B2B and B2C industry services. Recent improvements on environmental sustainability have the potential to better protect the region's natural resources, an area in which regional scores are close to global averages.

Subregion Analysis

Western Europe improved its TTCI score over 2017, remaining the most competitive subregion in the world. It accounts for over one-half of Europe's T&T spending, nearly two-thirds of its domestic spending, and is the largest source of outbound international expenditure in the region. Consisting of most of Europe's largest and most-developed economies, the subregion has an exceptional enabling environment, including Europe's highest-performing average business environment and strongest health and hygiene conditions, and ties with Northern Europe for the world's highest-scoring human resource and labour market. Moreover, Western Europe has the world's highest-rated overall infrastructure and is one of the TTCI's leading regions when it comes to cultural resources. Due to the maturity of its T&T economy, Western Europe experienced only slight increases or declines on most pillars. Yet the region's environmental sustainability improved substantially (a significant portion of this performance is due to a revised indicator for measuring fishing of overexploited or collapsed fish stocks), as did scores related to natural resources. The Price Competitiveness pillar was Western Europe's most enhanced, although the subregion remains the most expensive in Europe.

All but one member of Western Europe improved its T&T competitiveness since the last edition of the report. **Germany** is the subregion's largest T&T economy and third-most competitive in the world. The country boasts a large domestic T&T market, strong overall enabling

environment (6th), infrastructure (7th) and natural and cultural resources (8th). Yet, with a smaller T&T sector (measured by GDP), **France** (2nd) remains the most *competitive* T&T economy in Western Europe thanks to one of the world's best scores for cultural resources and business travel (2nd) and exceptional natural resources (6th). The **Netherlands** had the subregion's greatest improvement, moving up two places to rank 15th globally. The country made substantial progress on air transport infrastructure (10th to 8th); and revised figures resulted in enhanced environmental sustainability (9th to 6th) and natural resources (119th to 80th). The **United Kingdom** was the only country in Western Europe to decline in competitiveness (5th to 6th), due to falling digital demand, which also led to significant drops in scores on natural (16th to 21st) and cultural (7th) resources. The **Czech Republic** (38th) remains the least-competitive T&T economy in the subregion, holding Western Europe's lowest score for natural resources (93rd).

Southern Europe is the region's second-most competitive subregion. Thanks in part to one of the best combinations of natural and cultural resources, in 2017 Southern Europe brought in the largest number of Europe's international tourist arrivals. To manage this inflow, the subregion has developed the best tourism service infrastructure in the world, with a particularly high hotel density. Moreover, since Southern Europe depends on tourism more than any other subregion in Europe (based on visitor's share of internal T&T spending), the industry is highly prioritized and international openness is above the regional average. At the same time, the subregion trails the regional average in areas related to the enabling environment, especially when it comes to business environment and human resource and labour market. Southern Europe's growth in competitiveness is due mostly to broad improvements in infrastructure, ICT readiness, T&T prioritization and price competitiveness.

All eight economies in Southern Europe improved their T&T competitiveness from 2017 to 2019. **Cyprus** is the most improved (52nd to 44th) yet least competitive in the subregion. The country trails the global and European averages for environmental sustainability (111th) and natural (97th) and cultural resources (69th). Yet Cyprus experienced the subregion's largest percentage rise on pillars covering ICT readiness (59th to 21st) and air (50th to 41st) and ground and port (51st to 32nd) infrastructure. **Italy** (8th) has the subregion's largest T&T economy, benefiting from world-class natural (7th) and cultural (4th) resources, but is being held back by a relatively unfavourable business environment (110th). **Spain** remains the most T&T competitive country in the world thanks to rich natural (9th) and cultural (3rd) resources and impressive tourist service infrastructure (3rd). On the other hand, Spain also has the slowest rate of TTCI growth in Southern Europe since all the aforementioned strengths actually deteriorated between 2017 to 2019.

Northern Europe had the slowest rate of growth on the TTCI of all the European subregions but remains third-most competitive. Countries here tend to score highly for overall enabling environment, and the subregion includes Europe's best average scores for safety and security and ICT readiness. These nations also tend to do well on T&T

prioritization, international openness and infrastructure. However, a lack of price competitiveness and below global average scores related to cultural resources and business travel hold the region back. While Northern Europe scores below average for natural resource thanks to a more limited wildlife and low number of UNESCO World Heritage natural sites, it scores well for natural tourism digital demand and natural asset attractiveness.

Most of the subregion's nations enhanced their T&T competitiveness since the last report. **Denmark** is the region's most improved economy, climbing 10 places to rank 21st globally, thanks to a significant improvement on air transport infrastructure (44th to 29th) and price competitiveness, although it's still one of the world's most expensive countries (131st). **Norway** has Northern Europe's largest and most competitive T&T economy, but also experienced the largest decline in overall score (18th to 20th). Like much of the subregion, the country scores well in areas related to the overall enabling environment (8th), infrastructure (22nd) and prioritization of T&T (19th). However, Norway stands out for exceptional air transport infrastructure (5th), due to high airport (4th) and departure density, leading environmental sustainability (2nd) and above subregion average natural resources (51st). Nevertheless, the nation's Natural Resources pillar score dropped 21 places as recalibrated protected area data proved less favourable (100th). Natural tourism digital demand also fell (10th to 21st), as did scores related to business environment (10th to 20th) and safety and security (7th to 17th). Despite improvement, **Lithuania** still dropped three spots to 59th, keeping it as the least-competitive country in the subregion. While the nation's enabling environment (22nd) is strong relative to the global average, it trails subregional competition. In particular, Lithuania trails global and subregional averages when it comes to T&T prioritization (89th), air transport infrastructure (83rd) and natural (114th) and cultural (89th) resources.

The Balkans and Eastern Europe subregion has a lower T&T share of GDP than most other European subregions, but the countries here are the most dependent on international tourist arrivals for internal T&T spending. Consequently, there is a need to improve competitiveness to keep arrivals coming to maximize the subregion's T&T potential. Within this context, the Balkans and Eastern Europe had one of the fastest rates of improvement in T&T competitiveness of all the subregions. Countries narrowed their gap with other subregions in areas related to natural and cultural tourism, building their case as a travel destination. Enhanced T&T prioritization, tourist service infrastructure and price competitiveness (the subregion's strongest relative advantage to the rest of Europe) have reinforced this case; Balkan and Eastern European countries are diverting more resource to the industry, making travel more convenient and less expensive. In part thanks to these trends, subregional arrivals picked up—as more airlines are now offering flights—thereby expanding route capacity. It's no surprise, then, that the subregion had the strongest growth on air transport infrastructure in Europe. However, the subregion still underperforms the global average on six pillars and the European average on all but price competitiveness, indicating a need for continued improvements. In particular, subregional

players need to speed up their improvements on aspects related to enabling environment and ground infrastructure.

All but one country in the Balkans and Eastern Europe improved its T&T competitiveness since the last edition of the report. **Serbia** (95th to 83rd) was the most improved in the subregion—and the Europe and Eurasia region in general—thanks to significant enhancements to its enabling environment (62nd to 56th), T&T policy and enabling conditions (112th to 91st) and air (86th to 76th) and ground (94th to 85th) infrastructure. **Slovenia** (36th) remains the most competitive economy in the subregion due to its overall enabling environment (38th), T&T prioritization (33rd), ground (20th) and tourist service (27th) infrastructure, environmental sustainability (8th) and natural resources (26th). **Poland** (42nd) is the subregion's largest T&T economy and its second-most competitive. The country has benefited from a stronger performance on natural (72nd to 55th) and cultural (36th to 28th) resources, with its scores on the latter category being the best in the Balkans and Eastern Europe. **North Macedonia** was the only country in the subregion to decline in T&T competitiveness (89th to 101st). The nation's business environment (40th to 84th), human resources and labour market (83rd to 108th), safety and security (56th to 95th), T&T prioritization (85th to 114th), international openness (93rd to 119th) and ground infrastructure (62nd to 104th) all deteriorated substantially. Still, **Bosnia and Herzegovina** (105th) is the subregion's least-competitive T&T economy, despite an increase to its overall TTCI score. The country has the subregion's worst business environment (134th) and overall infrastructure (97th).

Eurasia is Europe's least competitive—but most improved—subregion. Countries in the subregion typically score higher than the global average for pillars in the Enabling Environment subindex—in particular, Health and Hygiene indicators. However, Eurasia only outscores the European average in price competitiveness. In general, the subregion suffers from a lack of international openness, underdeveloped infrastructure and underutilized natural and cultural resources. The subregion's rapid competitiveness improvement coincides in part with a T&T recovery following economic setbacks and instability. This includes enhanced safety and security (still the lowest in Europe), greater ICT readiness, international openness, T&T prioritization, price competitiveness and investment in infrastructure.

All eight of the subregion's economies improved their competitiveness since the last edition of the report. The **Russian Federation** (39th) is Eurasia's most competitive T&T economy and accounts for the majority of the subregion's T&T GDP. While the country trails subregional and global averages on business environment (92nd), safety and security (98th) and international openness (123rd), Russia does have strong air transport infrastructure (23rd), representing most of Eurasia's available seat kilometres. Moreover, it is the only Eurasian economy to score above the global average for natural (34th) and cultural (18th) resources. **Ukraine** had the fastest rate of TTCI score growth in the subregion, rising 10 places to rank 78th globally. In particular, as the country stabilized and recovered

economically, Ukraine drastically improved its business environment (124th to 103rd), safety and security (127th to 107th), international openness (78th to 55th) and overall infrastructure (79th to 73rd). **Kazakhstan** had the slowest rate of competitiveness improvement, moving up one place to rank 80th globally. The country has become more competitive along most TTCI pillars but was held back by declining business environment (36th to 49th), labour market (47th to 57th) and health and hygiene conditions (6th to 12th). The **Kyrgyz Republic** performed better than two years ago, but remains Eurasia's least-competitive T&T economy (110th). Most notably, the country needs further investment in its underdeveloped infrastructure (131st).

Selected Country/Economy Analysis

Spain remains the most competitive economy in the world when it comes to T&T. The nation is the second-most visited destination in the world and has developed an economy that is focused on tourism, with over half of internal T&T spending coming from international visitors. Spain's main points of attraction are its excellent natural (9th) and cultural (3rd) resources, with the latter being its greatest advantage relative to the rest of the world. The country is a centre for international meetings (4th) and sporting events and has the strongest combination of intangible culture and heritage sites (1st) in the world. The number of UNESCO-recognized Natural Heritage sites has also increased (11th to 9th), helping to boost the attractiveness of its natural assets (23rd to 10th). Servicing travellers is an exceptional tourism infrastructure (3rd), including a high hotel density. Intra-country travel is supported by quality railroads (11th) and roads (13th), while good port infrastructure (12th) could help the cruise industry. The nation's many international arrivals can rely on strong air transport infrastructure (10th), which includes a wide range of operating airlines (5th) that provide a considerable route capacity (8th). Moreover, like much of higher-income Europe, the country performs well in areas related to its overall enabling environment (33rd), with a solid global relative advantage on ICT readiness (27th) and security (16th).

More can be done, however, to improve Spain's human resource and labour market (41st), especially in light of worsening hiring and firing practices (107th to 126th). Despite improvement, the T&T industry is still constrained by a business environment (64th) that trails the European average. Specifically, tax policy could be reformed to have less of an impact on incentives to work and invest (107th), and the legal framework for settling disputes (80th) and challenging regulations (89th) could be adjusted. In addition, while overall environmental sustainability (25th) is above the global average, Spain's natural resources could benefit from a reversal of the recent deterioration in environmental enforcement and regulations (33rd to 48th) and forest cover (82nd to 85th). Lastly, competitiveness could be further improved by keeping an eye on Spain's falling price competitiveness (98th to 101st).

Germany is the region's largest T&T economy and ranked third on the global TTCI rankings. While it welcomes

less than half of the international tourist arrivals of either Spain or France, it still ranks 9th globally in this area, and its T&T industry benefits from a substantial, dynamic economy that generates a big enough domestic market to give the country the largest T&T GDP in Europe. Travel demand is generated by a rich and expanding cultural and business travel environment (6th), which is Germany's greatest strength relative to regional and global averages. Moreover, increased habitat protection (9th to 4th) and improved environmental sustainability (9th) have reinforced the country's valuable natural resources (35th to 30th). Conditions for T&T investment and operations continue to be conducive to robust competitiveness thanks to an increasingly favourable business atmosphere (18th to 14th) and labour market (7th to 3rd), which have helped to ease foreign labour restrictions (64th to 11th). While there is still room for improvement, T&T has become more prioritized by the German government (80th to 55th), which recently allocated additional funding (103rd to 60th) for this sector.

Connectivity is also bolstered by strong international openness (18th) and a highly developed infrastructure (7th). Germany has especially impressive road and railroad (5th) networks, efficient ground transport (9th), considerable airline selection (3rd) and high airline capacity (6th). However, worsening perceptions of airport (12th to 17th), road (16th to 19th) and tourism infrastructure (19th to 33rd) quality point towards the need for reinvestment. Moreover, while Germany has become less expensive (124th) and safer (51st to 41st), these remain the nation's least competitive aspects relative to the European average, potentially discouraging tourism.

Serbia experienced the largest score improvement in Europe, moving up 12 places to rank 83rd globally. In particular, Serbia has pursued polices that are highly beneficial to its internationally-focused and growing T&T industry. These include a substantial reduction in visa requirements (69th to 18th) and increased overall T&T prioritization (116th to 109th). Ticket prices and airport taxes have also been reduced (92nd to 55th), adding to the country's overall improvement when it comes to price competitiveness (76th to 67th). In line with this improved openness and lower costs, the nation's air transport infrastructure also improved (84th to 76th) as more airlines started operating in the country (51st to 46th) and perceptions of airport infrastructure quality became more positive (92nd to 88th). Likewise, Serbia's ground infrastructure also got better (94th to 85th). Conditions for T&T investment have also become more favourable, with broad improvement in areas related to the business environment (112th to 74th) and human resource and labour markets (82nd to 58th).

Despite so much improvement, a lot more needs to be done for Serbia to become truly competitive. The country needs to continue addressing its weak natural (127th) and cultural (67th) resources if it wishes to leverage recent gains. One positive sign is increased environmental sustainability (61st to 40th), which should help grow the attractiveness of its natural assets (100th). Moreover, tourism service infrastructure (77th) needs to become more accommodating; in particular, its online branding strategy (133rd) should be given more attention. Serbia also needs to continue reducing travel barriers by entering into more air service (97th) and trade agreements (77th). Lastly, the nation has to improve its safety and security (71st), which is a particularly important point of consideration for those looking to travel internationally.

MENA

Average score	Difference from global avg. of 3.8
3.7	**−4.4%**

Travel & Tourism Competitiveness Index 2019

Key Indicators

International tourist arrivals (thousands) 84,658.4
International tourism inbound receipts (US$ millions) 84,323.5
Average receipts per arrival (US$) 996.0
T&T industry GDP (US$ millions) 119,434.4
% of total *3.9%*

Domestic spending (share of internal T&T spending) 42.0%
Visitor spending (share of internal T&T spending)...................................... 58.0%
T&T industry employment (thousands)... 4,655.5
% of total *4.0%*

Middle East and North Africa Pillar Performance Overview, 2019
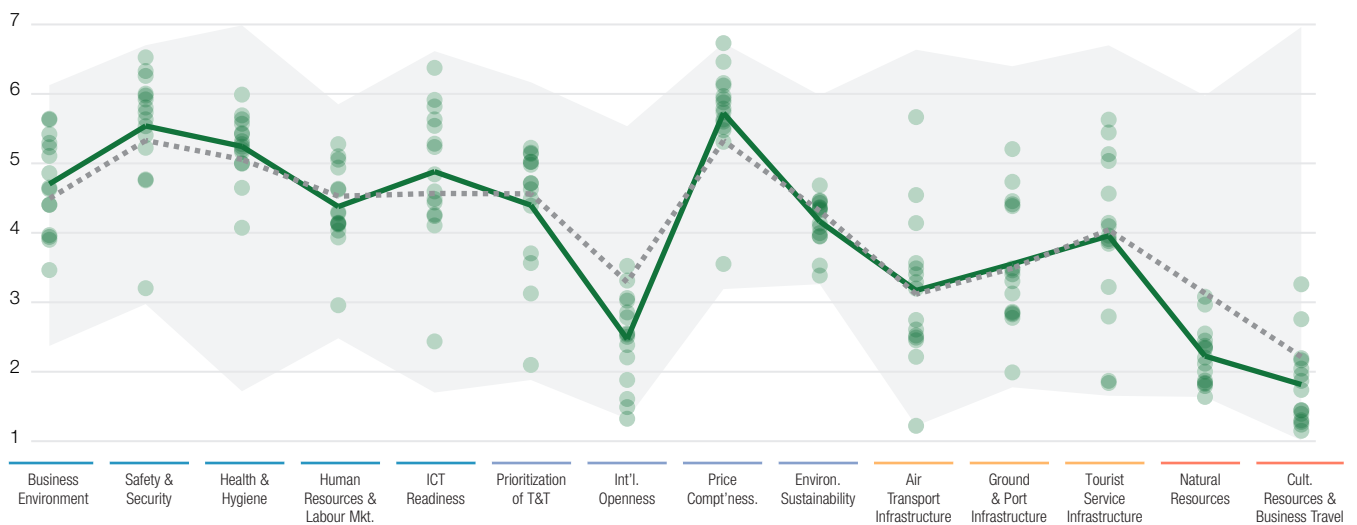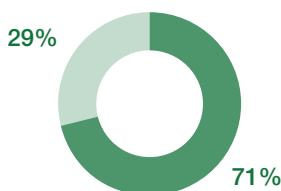
T&T GDP
subregion share

29%
71%

International tourist arrivals
subregion share

34%
66%

T&T employment
subregion share

55%
45%
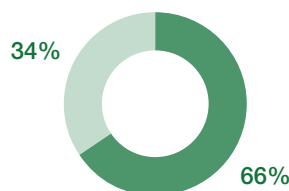
■ Middle East
■ North Africa
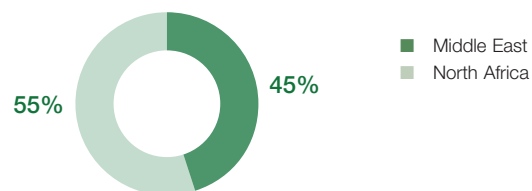
Middle East and North Africa Travel & Tourism Competitiveness Index Score by Country/Economy, 2019

Global average
MENA average

■ Middle East
■ North Africa

AE QA IL OM EG BH MA SA JO TN IR KW LB DZ YE
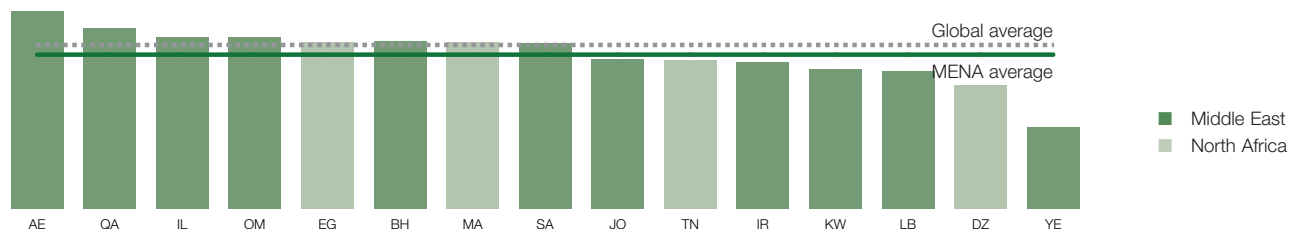
Regional Highlights

- Region with varied performance, which is degraded by lack of international openness and safety and security concerns.
- Competitiveness improved since 2017, with North Africa leading the trend.
- Strongest improvements came from the Safety and Security, International Openness, Environmental Sustainability and Air Transport Infrastructure pillars, with Price Competitiveness the region's most competitive pillar relative to the global average.

Note: See page 13 for sources and more explanation on how to read the Regional Profiles.

MENA Pillar Snapshot

Business Environment

Regional average
4.7 ▼

Difference from global avg. of 4.5
4.7%

Top scorer: **Qatar**
Most improved: **Morocco**

Qatar ranks 8th globally due to low tax rates (3rd) that have a low impact on work and investment (4th) and an efficient legal system and administration.

Price Competitiveness

Regional average
5.7 ▲

Difference from global avg. of 5.3
7.5%

Top scorer: **Iran, Islamic Rep.**
Most improved: **Israel**

Iran ranks 1st globally thanks to low ticket taxes and airport charges (7th), fuel prices (5th) and high purchasing power (5th).

Safety and Security

Regional average
5.5 ▲

Difference from global avg. of 5.3
3.9%

Top scorer: **Oman**
Most improved: **Egypt**

Oman ranks 3rd due to lower homicides rates (19th) a reliable police force (5th) and low costs of terrorism (7th) and crime (3rd).

Environmental Sustainability

Regional average
4.2 ▲

Difference from global avg. of 4.3
−3.5%

Top scorer: **Egypt**
Most improved: **Kuwait**

Egypt ranks 31st globally thanks to low levels of deforestation (13th) and below regional average air pollution (62nd), T&T industry sustainability (53rd) and water stress (61st).

Health and Hygiene

Regional average
5.2 ▼

Difference from global avg. of 5.1
3.7%

Top scorer: **Israel**
Most improved: **Algeria**

Israel ranks 46th globally due to comprehensive water and sanitation services coverage (1st), low to non-existent HIV (1st) and malaria (1st) rates, and high physician density (29th).

Air Transport Infrastructure

Regional average
3.2 ▲

Difference from global avg. of 3.1
1.7%

Top scorer: **United Arab Emirates**
Most improved: **Morocco**

United Arab Emirates ranks 4th globally thanks to its quality of air transport infrastructure (7th), high airline route capacity (5th) and numerous operating carriers (20th).

Human Resources and Labour Market

Regional average
4.4 ▲

Difference from global avg. of 4.5
−3.3%

Top scorer: **Israel**
Most improved: **Oman**

Israel ranks 21st globally thanks to its qualified labour force (32nd), including ease of finding skilled labour (2nd), and a good overall labour market (18th).

Ground and Port Infrastructure

Regional average
3.6 ▲

Difference from global avg. of 3.5
1.7%

Top scorer: **Bahrain**
Most improved: **Egypt**

Bahrain ranks 14th globally thanks to total and paved road density.

ICT Readiness

Regional average
4.9 ▲

Difference from global avg. of 4.6
6.9%

Top scorer: **United Arab Emirates**
Most improved: **Iran, Islamic Rep.**

United Arab Emirates ranks 4th globally thanks to a high density of mobile (2nd) and mobile internet subscriptions (1st) and network coverage (1st).

Tourist Service Infrastructure

Regional average
4.0 ▼

Difference from global avg. of 4.0
−2.1%

Top scorer: **United Arab Emirates**
Most improved: **Saudi Arabia**

United Arab Emirates ranks 22nd globally thanks to good hotel density and high perception of its tourism infrastructure quality (7th).

Prioritization of Travel & Tourism

Regional average
4.4 ▲

Difference from global avg. of 4.6
−3.6%

Top scorer: **Morocco**
Most improved: **Algeria**

Morocco ranks 26th globally thanks to government prioritization of T&T (30th), availability of data (16th) and above regional average effectiveness in tourism marketing (41st).

Natural Resources

Regional average
2.2 ▼

Difference from global avg. of 3.1
−28.9%

Top scorer: **Morocco**
Most improved: **Egypt**

Morocco ranks 63rd globally thanks to the degree to which natural assets are a reason for tourist arrivals (52nd) and digital demand (27th).

International Openness

Regional average
2.5 ▲

Difference from global avg. of 3.3
−24.9%

Top scorer: **Qatar**
Most improved: **Qatar**

Qatar ranks 64th globally thanks to a momentous reduction in visa requirements (119th to 3rd).

Cultural Resources and Business Travel

Regional average
1.8 ▼

Difference from global avg. of 2.2
−18.0%

Top scorer: **Egypt**
Most improved: **Jordan**

Egypt ranks 22nd globally thanks to its numerous sport stadiums (29th) and cultural and entertainment digital demand (4th).

Middle East and North Africa
TTCI 2019 Scores

Global Rank	Economy	Score	DIFFERENCE FROM 2017		SCORE DIFF. FROM BENCHMARK AVG.	
			Rank	Score Growth (%)	Regional (%)	Global (%)
33	United Arab Emirates	4.4	−4.0	−1.3%	20.5	15.3
51	Qatar	4.1	−4.0	1.5%	12.4	7.5
57	Israel	4.0	4.0	3.6%	8.3	3.5
58	Oman	4.0	8.0	5.1%	8.1	3.4
64	Bahrain	3.9	−5.0	0.4%	6.2	1.5
65	Egypt	3.9	9.0	7.0%	5.9	1.3
66	Morocco	3.9	−1.0	2.2%	5.9	1.2
69	Saudi Arabia	3.9	−6.0	1.4%	5.3	0.7
84	Jordan	3.6	−9.0	−1.2%	−2.5	−6.7
85	Tunisia	3.6	2.0	2.4%	−2.5	−6.8
89	Iran, Islamic Rep.	3.5	4.0	3.4%	−3.7	−7.9
96	Kuwait	3.4	4.0	2.7%	−7.1	−11.1
100	Lebanon	3.4	−3.0	0.3%	−8.1	−12.1
116	Algeria	3.1	3.0	2.5%	−14.5	−18.2
140	Yemen	2.4	−4.0	−0.9%	−34.3	−37.2

Source: World Economic Forum, 2019.

Middle East and North Africa
TTCI 2019 Scores

	Global Rank	ENABLING ENVIRONMENT					T&T POLICY & ENABLING CONDITIONS				INFRASTRUCTURE			NATURAL & CULT. RESOURCES	
		Business Environ-ment	Safety & Security	Health & Hygiene	Human Resources & Labor Market	ICT Readiness	Prioriti-zation of T&T	Int'l. Openness	Price Compt'ness.	Environ. Sustain-ability	Air Transport Infra-structure	Ground & Port Infra-structure	Tourist Service Infra-structure	Natural Resources	Cultural Res. & Business Travel
United Arab Emirates	33	5.6	6.3	5.4	5.1	6.4	4.7	3.0	5.5	4.5	5.7	4.5	5.6	2.4	2.2
Qatar	51	5.6	6.3	5.3	5.1	5.6	4.4	3.5	5.9	4.4	4.5	4.7	5.0	1.8	1.4
Israel	57	5.1	5.5	6.0	5.3	5.9	5.0	2.5	3.6	4.3	3.6	4.4	5.4	2.3	1.7
Oman	58	5.3	6.5	5.3	4.6	5.3	4.7	2.8	5.7	4.4	3.4	4.4	4.1	2.3	2.0
Bahrain	64	5.4	5.9	5.2	4.9	5.8	4.5	2.9	5.8	4.1	3.5	5.2	4.6	1.6	1.2
Saudi Arabia	69	5.2	6.0	5.7	4.6	5.2	4.6	1.6	5.9	4.0	4.1	3.5	5.1	1.9	1.9
Jordan	84	4.6	5.7	5.4	4.0	4.8	5.1	3.3	5.3	4.3	2.7	2.9	3.8	2.2	1.3
Iran, Islamic Rep.	89	3.9	5.4	5.0	4.1	4.5	3.7	2.4	6.7	3.9	2.5	3.1	2.8	2.4	2.8
Kuwait	96	4.7	5.8	5.6	4.3	5.5	3.6	1.9	5.6	4.0	2.6	3.3	3.9	1.8	1.1
Lebanon	100	4.0	4.8	5.6	3.9	4.1	5.0	2.5	5.5	4.1	2.5	2.8	4.0	2.0	1.4
Yemen	140	3.5	3.2	4.1	3.0	2.4	2.1	1.3	6.0	3.4	1.2	2.0	1.9	1.8	1.3
Middle East Aveage		**4.8**	**5.6**	**5.3**	**4.5**	**5.1**	**4.3**	**2.5**	**5.6**	**4.1**	**3.3**	**3.7**	**4.2**	**2.1**	**1.7**
Egypt	65	4.4	4.8	5.0	4.3	4.3	5.2	2.2	6.5	4.7	3.3	3.4	3.2	3.0	3.3
Morocco	66	4.9	6.0	4.6	4.1	4.6	5.2	3.1	5.6	4.5	3.2	3.5	3.9	3.1	2.2
Tunisia	85	4.4	5.2	5.2	4.1	4.4	5.0	2.6	6.1	4.4	2.5	2.8	4.1	2.6	1.4
Algeria	116	3.9	5.6	5.2	4.1	4.2	3.1	1.5	6.2	3.5	2.2	2.8	1.8	2.1	2.0
North Africa Average		**4.4**	**5.4**	**5.0**	**4.2**	**4.4**	**4.6**	**2.3**	**6.1**	**4.3**	**2.8**	**3.1**	**3.3**	**2.7**	**2.2**
MENA AVERAGE		**4.7**	**5.5**	**5.2**	**4.4**	**4.9**	**4.4**	**2.5**	**5.7**	**4.2**	**3.2**	**3.6**	**4.0**	**2.2**	**1.8**

Bottom 20%   Top 20%

Middle East and North Africa (MENA)
Regional Analysis

Overview

The Middle East and North Africa (MENA) region significantly improved its T&T competitiveness since the last edition of the TTCI. With 12 of the 15 MENA economies covered by this year's index increasing their score compared to 2017, the region was able to slightly outpace the global average in competitiveness growth. This is particularly important given that, in the aggregate, T&T accounts for a greater share of regional GDP than in any of the other four regions. MENA is also the only region where international visitor spending is greater than domestic visitor spending. Yet despite improved competitiveness and a strong reliance on T&T for overall economic growth, MENA continues to underperform the global TTCI score average.

MENA's below-average competitiveness is primarily a result of low scores on indicators related to natural and cultural resources and international openness. The region's historical and religious heritage and geographic features create the potential for significant natural and cultural tourism; yet, while some individual nations come close, no MENA country scores above the global average for natural resources and only Egypt and Iran score above for cultural resources. In fact, the entire region's score in both of these areas has fallen in recent years. More needs to be done to expand habit protection and heritage sites. Moreover, digital demand for MENA's natural, cultural and entertainment demand is fairly low, indicating potential gaps in marketing and traveller perceptions. One potential reason for this gap is continued safety and security concerns. Eleven MENA countries rank within the bottom 40 for terrorism incidents, with two among the worst 10 countries globally. Further, the region is plagued by geopolitical tensions, instability and conflict. Security concerns also play a role in why MENA members are some of the most restrictive when it comes to international openness, with only Qatar, Oman and Morocco making significant improvements. Consequently, travellers often face barriers when visiting the region, while the aviation and overall T&T sector is stifled by limiting bilateral air service and regional trade agreements.

More positively, stability, safety and security have started to recover throughout the region, slightly reducing travel fears and underlying one of the key reasons for the recent pickup in arrivals. Furthermore, it seems that there has been greater recognition of T&T's importance, with broad regional improvements in T&T prioritization, including increased government funding and more effective marketing campaigns to bring back or attract new visitors. Greatly enhanced environmental sustainability also has the potential to pay dividends for natural assets (note that environmental sustainability comparison is influenced by the use of new data to measure marine sustainability). In addition, prices have become more competitive among countries within the region, amplifying MENA's single biggest advantage relative to the global average. As one of the world's main producers of fossil fuels, MENA includes some of the world's lowest fuel prices, with some governments offering subsidies. Moreover, many of the region's economies offer visitors greater purchasing power (especially Egypt, Algeria, Iran and Tunisia), which has been increased by lower exchange rates. Yet it is reductions in ticket taxes and airport charges as well as lower hotel prices that have primarily driven regional price competitiveness in recent years.

Infrastructure has also improved, with particularly impressive growth in the number of airlines and route capacity. Despite these gains, world-class infrastructure remains concentrated among the Arab states of the Persian Gulf. The Gulf countries have been able to use their natural resource wealth, central geographic location and relative security to develop world-class T&T infrastructure, defined by quality airports, ports, roads, tourist services and some of the world's leading airlines. These efforts are in stark contrast to some other MENA nations that—due to a lack of investment and ongoing instability—have yet to develop competitive infrastructure, especially regarding air transport. Similarly, the region's above-average score on the Enabling Environment subindex is due to the performance of the Gulf countries and Israel, which have developed economies, strong business environments, ICT readiness and some of the highest scores in safety and security. Finally, most regional economies also score near the bottom when it comes to female participation in the labour market, depriving the T&T industry of a greater labour and skills pool.

Subregion Analysis

The **Middle East** subregion is by far the more competitive of the two subregions, outscoring North Africa on nine pillars. Thanks to the Arab states of the Persian Gulf and Israel, the subregion is wealthier and more developed than the North Africa subregion. Consequently, it is no surprise that the Middle East scores above the global *and* regional averages on indicators related to enabling environment and infrastructure, with particularly high ranks on ICT readiness and business environment. Nevertheless, the subregion does trail the world and North Africa on T&T prioritization and policy and natural and cultural resources. In particular, many Middle East nations score relatively low on the International Openness and Natural Resources pillars, which represent the subregion's greatest disadvantages relative to global competition. One of the Middle East's highest-scoring pillars is Price Competitiveness, with some economies leveraging their fossil fuel abundance to offer lower fuel prices. Since the 2017 edition of the report, the subregion has improved across all pillars of T&T policy and enabling conditions, safety and security, ICT readiness and much of infrastructure, but declined or stagnated on other pillars.

This year, eight out of the subregion's 11 members improved their TTCI score since 2017. **Oman** demonstrated the greatest improvement, moving up eight places to 58th. MENA's safest (3rd) country recorded the subregion's fastest improvement for its human resources and labour markets (103rd to 65th), and is among the most improved when it comes to international openness (116th to 97th), environmental sustainability (109th to 57th) and overall infrastructure (60th to 52nd). Yet some of the improvement in environmental sustainability is exaggerated due to new marine sustainability metrics. In contrast, the **UAE** had the Middle East's largest decline, falling from 29th to 33rd, including the biggest percentage decline in score on the Safety and Security pillar (falling from 2nd to 7th) and Ground and Port Infrastructure (19th to 31st) and the subregion's only decline on Environmental Sustainability (40th to 41st). Nevertheless, the country remains in the lead in the Middle East and is MENA's top TTCI scorer, leading on ICT readiness (4th), air transport (4th) and tourist service (22nd) infrastructure. The Middle East's—and MENA's—largest T&T economy is **Saudi Arabia** (69th), which scores above the subregion's average on most pillars, but near the bottom on international openness (137th). Plagued by ongoing conflict and a lingering humanitarian crisis, **Yemen** (140th), ranks at the bottom of the global index.

North Africa scores lower than the Middle East, but demonstrates far greater improvement in overall competitiveness. The subregion outscores the Middle East on five pillars and bests the global average on four. North Africa is the most price competitive subregion in the world, with three out of its four members among the 12 least-expensive economies covered in the report. North Africa's greatest advantage relative to the Middle East is its natural and cultural resources—although it still underperforms the world on both the Natural Resources and Cultural and Business Travel pillars. The subregion also bests the MENA average in prioritization of T&T and environmental sustainability, areas where it has improved since 2017. On the other hand, North Africa has underdeveloped infrastructure and T&T enabling environment, contrasting some of the high performers in the Middle East subregion. In particular, North Africa trails when it comes to tourist service infrastructure and ICT readiness. The subregion's strong rate of improvement is due to enhanced safety and security, overall T&T policy and enabling conditions and air transport and ground infrastructure.

All four members of the North Africa subregion increased their TTCI scores over 2017. **Egypt** (65th) is the subregion's top scorer and its largest T&T economy. The country is also MENA's most improved scorer. Egypt is price competitive (3rd) and has MENA's highest score for cultural resources (22nd). Its improvement comes from increases on 11 pillar scores. These include the world's second-best enhancement of safety and security (130th to 112th), albeit from a low starting base. **Morocco** (66th) demonstrates North Africa's slowest improvement in TTCI performance. The country is a close second to Egypt when it comes to *overall* competitiveness, boasting the MENA region's top TTCI scores on natural resources (63rd) and North Africa's best enabling environment (71st) and infrastructure (69th). However, TTCI performance improvement is tempered by declining safety and security (20th to 28th), which remains well above the subregion's average, and a deteriorating combination of natural and cultural (41st to 54th) resources. North Africa's lowest scoring member is **Algeria** (116th), which nonetheless did move up two ranks globally. The country ranks low on business environment (118th), T&T prioritization (132nd), tourist services infrastructure (136th), environmental sustainability (133rd), natural resources (126th) and international openness (139th). On the other hand, Algeria is one of the most price-competitive countries in the world (8th).

Selected Country/Economy Analysis

The **United Arab Emirates** remains MENA's highest-scoring economy, ranking 33rd globally. The country has the best overall enabling environment in the region (17th), with the highest score for this subindex of any country outside of Europe, Asia-Pacific and North America. The UAE has a very good business environment (9th), human resource and labour market (26th) and safety and security conditions (7th), and is gaining momentum on ICT readiness (15th to 4th). Consequently, the nation has favourable conditions for T&T investment and growth. However, the UAE's biggest edge over average regional competition is its infrastructure, which ranks 13th globally. The country's central location between Europe and Asia, strong business environment and government investment has allowed it to turn into a major global aviation hub, with the fourth highest Air Transport Infrastructure pillar score in the rankings. The UAE also boasts high-quality roads (9th) and ports (9th) and improved tourist service infrastructure (27th to 22nd). As a regional business and transport hub, the UAE also attracts business travellers, encouraging international association meetings (41st). Combined with

several oral and intangible heritage customs (21st), the country scores relatively well when it comes to cultural resources (45th), essentially matching the global average.

Despite the UAE's clear advantages it still dropped four ranks in 2019. The country ranks low on natural resources (103rd), with no World Heritage natural sites, and a relative lack of wildlife (118th), which might explain the reduction in natural environment as a reason for tourist arrivals (40th to 63rd). Additionally, while the UAE ranks 8th in terms of the effectiveness of its tourism marketing, that still represents a fall from 2017, with online country brand strategy and searches for its natural and cultural assets ranking 126th, 122nd and 116th , respectively. Perceptions of government prioritization of T&T have also declined (1st to 21st), indicating potential danger for the UAE's competitive advantages. Even the aforementioned leads on the pillars of the Enabling Environment and Infrastructure subindexes narrowed slightly since 2017. On the other hand, there were improvements on international openness (83rd) and price competition (64th), areas where the country has needed to bridge gaps.

Saudi Arabia accounts for about one-fifth of regional T&T GDP and ranks eighth regionally and 69th globally on the index. The country is also MENA's largest destination for travellers, attracting over 16 million people in 2017,[*] many of whom were religious pilgrims. Saudi Arabia scores near the top for tourist service infrastructure (35th), with strong performance improvements for hotel capacity. The nation's capacity for T&T has also been improved due to better air transport infrastructure (38th to 35th), which ranks 3rd regionally. Nevertheless, Saudi Arabia has several weaknesses that hold back its ability to diversify and expand its T&T industry. Chief among them is the country's lack of international openness (137th), which includes some of the strictest visa requirements in the world (139th). Additionally, the country's strong price competitiveness (21st), which is boosted by some of the world's lowest fuel prices (2nd), has been hampered by a rise in ticket taxes and airport charges (26th to 52nd), potentially making flights more expensive. Moreover, the country can do more to broaden its case as a tourism destination, including improving its relatively low standing for natural (133rd) and cultural (58th) resources. Refinement in data has shown that the country needs to expand protected territory coverage (104th) if it wants to make its natural resources (128th) more attractive. This deterioration of natural and cultural resource is offsetting gains elsewhere and has led to the tepid growth in TTCI scores, resulting in the country losing six places on the global rankings.

However, there are signs that the country is addressing some of these drawbacks. Environmental sustainability has been enhanced (124th to 106th), due in part to improved environmental regulatory oversight (53rd to 41st). Yet, some of this improvement also comes from a new indicator for marine sustainability, which has reduced pillar comparability. Bolstered perception of the government's prioritization of the T&T industry (82nd to

53rd) and effectiveness in tourism marketing (87th to 70th) also indicate real efforts to boost competitiveness. Over the past two years, Saudi Arabia has also made progress on an already good business environment, moving from 26th to 22nd, which could encourage investment in its T&T industry. There has also been impressive progress with regard to safety and security (61st to 23rd) as homicide rates dropped (48th) and police reliability improved (13th). The fall in terrorist incidence should also mitigate often-held safety fears; but since this indicator still ranks 123rd, far more needs to be done to dispel concerns.

Egypt had the fourth-highest TTCI performance improvement in the report, moving up nine places to rank 65th globally. The country benefited from score increases on 11 pillars, and scores on six of these pillars improved at or near double digit rates. Egypt is a global leader in terms of cultural resources (22nd). The country is home to some of the world's most famous landmarks such as the Giza Pyramids Complex, helping it rank 38th in terms of World Heritage cultural sites and fourth regarding cultural tourism online searches. Nevertheless, it was Egypt's improvements on natural resources (97th to 69th) that truly led to its overall improved TTCI score, with the attractiveness of its natural resources moving up 87 spots to 44th position. The country has long been regarded as a prime destination for nature-based activities such as beach resorts, with Egypt's price competitiveness (3rd) attracting tourists seeking inexpensive vacations. There have also been efforts to build upon these strengths with greater prioritization of T&T (37th to 31st) via increased government expenditure (22nd to 18th), enhanced tourism brand strategy (60th to 5th) and improved air (55th) as well as ground and port (64th) infrastructure. Natural resources might have also been made more appealing due to improvements on environmental regulatory enforcement and stringency (98th) and the sustainability of T&T development (53rd), though it's widely acknowledged that more needs to be done.

Fundamental to most of these improvements and their ability to increase tourist arrivals is Egypt's stability, which has been under pressure in recent years. Since the last edition of the report, Egypt has had the second highest safety and security improvement in the world, helping it move up 18 places on the pillar rankings. Such an improvement is likely to make travellers more confident in going to Egypt. Yet the country still ranks 112th in this category and has one of the index's highest incidences of terrorism (135th). Consequently, this is likely to remain one of Egypt's most acute deterrents to more tourism. Increased visa requirements (51st to 123rd) have not helped induce the flow of tourists, with the country remaining one of the least internationally open (124th) in the world. Additionally, even with recent gains, Egypt needs to improve the other components of the Enabling Environment (86th) subindex to encourage greater T&T investment.

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* World Tourism Organization, UNWTO database, latest year available.

Sub-Saharan Africa

Average score 3.1   **Difference from global avg. of 3.8** −18.9%

Travel & Tourism Competitiveness Index 2019

Key Indicators

International tourist arrivals (thousands) 37,413.5

International tourism inbound receipts (US$ millions) 24,717.9

Average receipts per arrival (US$) 660.7

T&T industry GDP (US$ millions) 42,069.2

   % of total *2.8%*
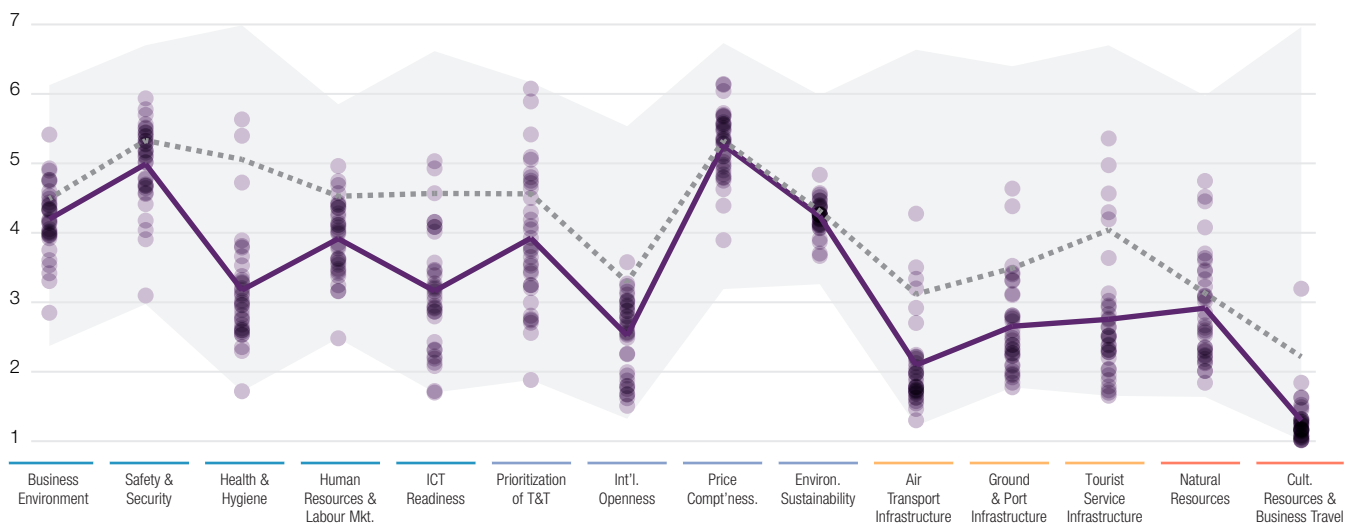
Domestic spending (share of internal T&T spending) 59.2%

Visitor spending (share of internal T&T spending) 40.8%

T&T industry employment (thousands) 6,767.6

   % of total *2.4%*

Sub-Saharan Africa Pillar Performance Overview, 2019

T&T GDP
subregion share

30%
35%
35%

International tourist arrivals
subregion share

28%
23%
49%

T&T employment
subregion share

44%
40%
16%
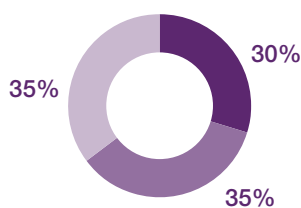
■ Eastern Africa
■ Southern Africa
■ Western Africa
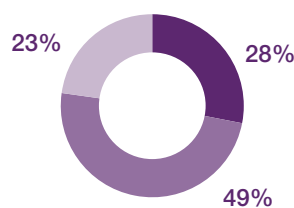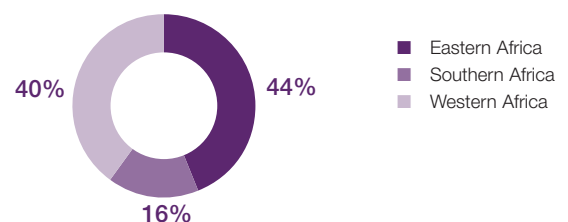
Sub-Saharan Africa Travel & Tourism Competitiveness Index Score by Country/Economy, 2019

Global average
Sub-Saharan average

MU ZA SC NA KE CV BW TZ SN RW GM UG ZW ZM GH SZ CI LS BJ ET MW MZ GN CM NG ML SL BF AO MR CD BI LR TD

■ Eastern Africa
■ Southern Africa
■ Western Africa
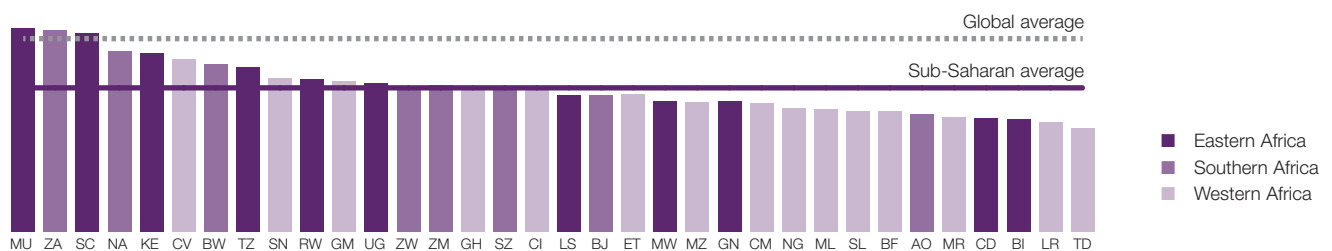
Regional Highlights

• Untapped potential for natural tourism, which suffers from a current lack of development and investment.

• Improved competitiveness since 2017, with Western Africa leading the way.

• Strongest improvement came from ICT Readiness, International Openness and Price Competitiveness, which is the region's most competitive pillar relative to the global average.

Note: See page 13 for sources and more explanation on how to read the Regional Profiles.

Sub-Saharan Africa Pillar Snapshot

Business Environment

Regional average
4.2 ▾

Difference from global avg. of 4.5
−6.6%

Top scorer: **Mauritius**
Most improved: **Zimbabwe**

Mauritius ranks 17th globally thanks to lower tax rates (18th), with minimal impact on work and investment (8th) and a favourable legal system.

Safety and Security

Regional average
5.0 ▴

Difference from global avg. of 5.3
−6.4%

Top scorer: **Rwanda**
Most improved: **Kenya**

Rwanda ranks 31st globally due to below regional average crime (32nd) and terrorism (64th) costs, homicide rates (68th) and higher police reliability (31st).

Health and Hygiene

Regional average
3.2 ▾

Difference from global avg. of 5.1
−37.2%

Top scorer: **Mauritius**
Most improved: **Côte d'Ivoire**

Mauritius ranks 58th globally due to above regional average scoring for underlying indicators such as the use of basic sanitation and water (50th).

Human Resources and Labour Market

Regional average
3.9 ▾

Difference from global avg. of 4.5
−13.5%

Top scorer: **Seychelles**
Most improved: **Côte d'Ivoire**

Seychelles ranks 39th globally due to a relatively qualified labour (55th) and a good labour market (33rd), defined by high female participation rate (31st).

ICT Readiness

Regional average
3.2 ▴

Difference from global avg. of 4.6
−30.8%

Top scorer: **Seychelles**
Most improved: **Mauritania**

Seychelles ranks 59th globally due to mobile subscription density (4th) and above regional average fixed (57th) and mobile (60th) internet subscriptions.

Prioritization of Travel & Tourism

Regional average
3.9 ▴

Difference from global avg. of 4.6
−14.0%

Top scorer: **Mauritius**
Most improved: **Senegal**

Mauritius ranks 5th globally thanks to government prioritization of T&T (6th), including related expenditures (4th) and comprehensive data (35th).

International Openness

Regional average
2.5 ▴

Difference from global avg. of 3.3
−23.4%

Top scorer: **Mauritius**
Most improved: **Benin**

Mauritius ranks 62nd globally thanks to favourable visa requirements (5th).

Price Competitiveness

Regional average
5.3 ▴

Difference from global avg. of 5.3
−1.1%

Top scorer: **Lesotho**
Most improved: **Senegal**

Lesotho ranks 10th globally thanks to drastically reduced ticket taxes and airport charges (1st).

Environmental Sustainability

Regional average
4.2 ▴

Difference from global avg. of 4.3
−1.8%

Top scorer: **Lesotho**
Most improved: **Nigeria**

Lesotho ranks 20th globally due to environmental regulations and enforcement (14th), sustainable development of T&T (1st) and low deforestation (14th).

Air Transport Infrastructure

Regional average
2.1 ▴

Difference from global avg. of 3.1
−32.8%

Top scorer: **Seychelles**
Most improved: **Sierra Leone**

Seychelles ranks 32nd globally thanks to a high concentration of airport facilities (1st).

Ground and Port Infrastructure

Regional average
2.7 ▴

Difference from global avg. of 3.5
−23.9%

Top scorer: **Mauritius**
Most improved: **Sierra Leone**

Mauritius ranks 24th globally thanks to overall road density and relatively good ground transport efficiency (48th).

Tourist Service Infrastructure

Regional average
2.8 ▾

Difference from global avg. of 4.0
−31.9%

Top scorer: **Seychelles**
Most improved: **Namibia**

Seychelles ranks 30th globally thanks to high hotel density.

Natural Resources

Regional average
2.9 ▾

Difference from global avg. of 3.1
−6.9%

Top scorer: **Tanzania**
Most improved: **Benin**

Tanzania ranks 12th globally due to its numerous World Heritage natural sites (18th), impressive wildlife (12th) and habitat protection (10th).

Cultural Resources and Business Travel

Regional average
1.3 ▾

Difference from global avg. of 2.2
−41.4%

Top scorer: **South Africa**
Most improved: **Malawi**

South Africa ranks 23rd globally thanks to its stadiums (13th) and above-average (regional) number of international association meetings (35th).

Sub-Saharan Africa TTCI 2019 Rankings

Global Rank	Economy	Score	DIFFERENCE FROM 2017		SCORE DIFF. FROM BENCHMARK AVG.	
			Rank	Score Growth (%)	Regional (%)	Global (%)
54	Mauritius	4.0	1.0	2.3	28.5	4.2
61	South Africa	4.0	−8.0	−1.2	27.3	3.2
62	Seychelles	3.9	n/a	n/a	25.9	2.1
81	Namibia	3.7	−3.0	1.7	17.5	−4.7
82	Kenya	3.6	−1.0	1.0	16.3	−5.7
88	Cape Verde	3.6	−5.0	−0.1	13.8	−7.7
92	Botswana	3.5	−7.0	−1.2	11.4	−9.6
95	Tanzania	3.4	−4.0	−0.5	10.0	−10.8
106	Senegal	3.3	4.0	3.8	4.5	−15.2
107	Rwanda	3.2	−11.0	−3.9	4.1	−15.5
111	Gambia, The	3.2	0.0	2.8	3.4	−16.1
112	Uganda	3.2	−5.0	−0.3	2.3	−17.0
113	Zambia	3.2	−5.0	−0.6	1.3	−17.8
114	Zimbabwe	3.2	0.0	1.2	1.0	−18.0
115	Ghana	3.1	5.0	3.4	0.9	−18.2
118	Eswatini	3.1	n/a	n/a	0.1	−18.8
119	Côte d'Ivoire	3.1	−10.0	−1.6	−0.2	−19.1
122	Ethiopia	3.0	−6.0	−2.4	−3.1	−21.4
123	Benin	3.0	4.0	6.3	−3.2	−21.5
124	Lesotho	3.0	4.0	6.4	−3.3	−21.5
125	Malawi	2.9	−2.0	0.7	−6.2	−23.9
126	Guinea	2.9	n/a	n/a	−6.4	−24.1
127	Mozambique	2.9	−5.0	−0.4	−6.7	−24.3
128	Cameroon	2.9	−2.0	0.7	−7.1	−24.7
129	Nigeria	2.8	0.0	0.0	−9.7	−26.8
130	Mali	2.8	0.0	0.8	−10.1	−27.1
131	Sierra Leone	2.8	0.0	3.4	−10.8	−27.6
132	Burkina Faso	2.8	n/a	n/a	−10.9	−27.7
134	Angola	2.7	n/a	n/a	−12.3	−28.9
135	Mauritania	2.7	−3.0	1.8	−13.9	−30.2
136	Congo, Democratic Rep.	2.7	−3.0	1.4	−14.3	−30.5
137	Burundi	2.7	−3.0	3.7	−14.8	−30.9
138	Liberia	2.6	n/a	n/a	−16.4	−32.2
139	Chad	2.5	−4.0	0.0	−19.1	−34.4

Source: World Economic Forum, 2019.

Sub-Saharan Africa TTCI 2019 Scores

	Global Rank	ENABLING ENVIRONMENT					T&T POLICY & ENABLING CONDITIONS				INFRASTRUCTURE			NATURAL & CULT. RESOURCES	
		Business Environment	Safety & Security	Health & Hygiene	Human Resources & Labor Market	ICT Readiness	Prioritization of T&T	Int'l. Openness	Price Compt'ness.	Environ. Sustainability	Air Transport Infrastructure	Ground & Port Infrastructure	Tourist Service Infrastructure	Natural Resources	Cultural Res. & Business Travel
South Africa	61	4.6	3.9	3.7	4.4	4.6	4.5	2.5	5.6	3.7	3.3	3.5	4.3	4.5	3.2
Namibia	81	4.8	5.0	3.5	4.4	4.2	4.8	2.8	5.7	4.3	2.9	3.4	4.6	3.5	1.2
Botswana	92	4.9	5.3	3.3	4.3	4.1	4.8	2.3	6.0	4.3	2.1	2.8	3.6	3.4	1.2
Zambia	113	4.4	5.3	2.6	3.8	3.2	3.9	2.9	5.1	4.4	1.8	2.4	2.5	3.6	1.3
Zimbabwe	114	3.3	5.4	3.0	3.6	3.2	4.2	3.0	5.3	4.1	1.8	2.3	3.0	3.6	1.3
Eswatini	118	4.4	5.5	3.1	3.8	2.3	4.6	2.7	6.1	3.7	2.2	3.1	3.0	2.2	1.0
Lesotho	124	4.1	5.4	3.0	3.6	3.2	5.1	2.6	6.1	4.8	1.3	1.8	2.8	2.2	1.0
Angola	134	3.5	5.0	3.2	3.2	2.3	3.2	1.9	5.3	4.1	1.7	2.0	2.7	2.2	1.2
Southern Africa Average		**4.2**	**5.1**	**3.2**	**3.9**	**3.4**	**4.4**	**2.6**	**5.7**	**4.2**	**2.1**	**2.7**	**3.3**	**3.2**	**1.4**
Mauritius	54	5.4	5.8	5.6	4.7	4.9	6.1	3.6	4.6	4.3	3.2	4.6	5.0	2.4	1.3
Seychelles	62	4.7	5.2	5.4	5.0	5.0	5.9	2.7	3.9	4.3	4.3	4.4	5.4	2.6	1.0
Kenya	82	4.5	4.6	3.4	4.4	3.5	5.4	3.0	4.9	4.5	2.7	3.3	2.9	4.5	1.5
Tanzania	95	4.0	5.2	3.0	3.6	2.9	4.9	3.3	5.5	4.4	2.2	2.8	2.4	4.7	1.3
Rwanda	107	4.9	5.9	2.8	4.4	3.4	4.1	3.2	5.3	4.5	1.9	3.4	2.3	2.6	1.2
Uganda	112	4.2	4.7	2.5	4.1	3.0	4.3	3.0	5.7	4.2	1.7	2.5	2.3	3.7	1.5
Ethiopia	122	3.9	5.1	3.3	3.6	2.4	3.8	2.6	5.5	4.1	2.2	2.4	1.7	3.0	1.6
Malawi	125	4.0	5.4	2.7	4.0	2.2	3.6	2.5	5.6	4.1	1.5	2.1	2.0	3.1	1.5
Mozambique	127	3.8	4.7	1.7	3.5	2.1	4.0	3.1	5.6	4.3	1.8	2.2	2.8	2.8	1.2
Congo, Democratic Rep.	136	3.6	4.4	2.6	3.8	1.7	1.9	1.5	4.8	3.9	1.6	2.0	1.9	4.1	1.2
Burundi	137	4.0	4.8	3.2	4.1	1.7	2.8	1.8	5.4	4.1	1.7	2.5	1.7	2.1	1.1
Eastern Africa Average		**4.3**	**5.1**	**3.3**	**4.1**	**3.0**	**4.2**	**2.7**	**5.2**	**4.2**	**2.3**	**2.9**	**2.8**	**3.2**	**1.3**
Cape Verde	88	4.5	5.2	4.7	4.2	4.2	4.7	3.2	5.7	4.5	3.5	3.1	4.2	2.0	1.0
Senegal	106	4.3	5.3	3.8	3.5	3.6	3.7	2.8	5.0	4.6	2.2	2.8	3.1	3.1	1.3
Gambia, The	111	4.3	5.7	3.9	4.1	3.4	5.1	2.3	5.3	4.4	2.0	3.3	2.6	2.3	1.1
Ghana	115	4.8	5.5	3.0	4.7	4.1	3.8	3.0	5.0	4.1	2.0	2.6	2.3	2.5	1.3
Côte d'Ivoire	119	4.3	4.6	3.3	4.0	4.0	2.6	2.6	5.1	4.1	2.1	2.8	2.6	3.3	1.3
Benin	123	4.4	5.4	2.5	4.6	2.9	3.5	2.9	5.1	4.3	1.7	2.3	2.5	2.9	1.2
Guinea	126	4.2	4.6	2.6	4.1	3.2	2.7	1.8	5.7	4.5	1.9	2.3	2.4	3.1	1.1
Cameroon	128	4.0	4.7	2.8	4.4	2.8	3.0	1.8	5.0	4.4	1.7	2.5	2.2	3.2	1.2
Nigeria	129	4.2	3.1	2.9	3.5	2.9	3.4	1.9	5.5	4.3	2.0	2.0	2.5	2.3	1.8
Mali	130	4.0	4.0	2.6	3.2	3.3	3.7	1.7	4.8	4.3	2.0	2.1	2.5	2.3	1.6
Sierra Leone	131	4.0	5.1	2.3	4.0	3.1	3.4	2.8	4.4	4.2	1.7	2.7	1.9	2.1	1.1
Burkina Faso	132	4.3	4.8	2.4	3.4	2.9	3.2	1.6	5.5	4.2	1.6	2.2	2.3	2.6	1.2
Mauritania	135	3.4	5.6	3.8	2.5	3.0	2.8	2.9	5.3	3.9	1.6	1.8	2.0	2.0	1.1
Liberia	138	4.1	5.3	3.1	3.4	2.1	2.7	2.0	4.8	4.3	1.8	2.3	1.7	1.8	1.1
Chad	139	2.8	4.2	2.8	3.2	2.2	3.2	1.7	4.8	4.2	1.5	1.9	1.8	2.7	1.0
Western Africa Average		**4.1**	**4.9**	**3.1**	**3.8**	**3.2**	**3.4**	**2.3**	**5.1**	**4.3**	**1.9**	**2.5**	**2.4**	**2.6**	**1.2**
SUB-SAHARAN AVERAGE		**4.2**	**5.0**	**3.2**	**3.9**	**3.2**	**3.9**	**2.5**	**5.3**	**4.2**	**2.1**	**2.7**	**2.8**	**2.9**	**1.3**

Bottom 20%   Top 20%

Sub-Saharan Africa Regional Analysis

Overview

While the region has improved since the 2017 edition of the report, Sub-Saharan Africa ranks at the bottom of the TTCI, lagging behind the rest of the world across all pillars, with only Mauritius, South Africa and Seychelles scoring above the global average on the index. At the same time, however, the region continues to outpace the global average in international tourism arrivals and receipts growth: the World Travel and Tourism Council forecasts Africa economies covered by this year's TTCI to have the second highest rate of growth in T&T GDP in the ten years from 2019–2029.* As a result, if the region manages to pick up the pace of improvement, investors will be more likely view the region as an attractive investment opportunity to diversify away from more mature markets.

Sub-Saharan Africa's travel and tourism market is very small. In 2018, the T&T industry's GDP of African countries covered in this report totalled approximately $42.1 billion, with 37.4 million tourist arrivals in 2017, about 1.6% and 3.0% of the global total, respectively.* In general, with the majority of the region's economies classified as low or lower-middle income, Sub-Saharan Africa lacks the robust middle class and economic resources required to generate intra-regional travel and tourism investment at the same scale as other parts of the world, although both aspects are demonstrating steady growth. In particular, the current lack of investment means that the region has the least-developed infrastructure in the world, clogging up the vital arteries of travel and tourism. The region's air transport infrastructure—defined by a weak domestic airline industry and a lack of airport density— greatly undermines local economies' ability to facilitate tourist and business travel, which are already hampered by the vast size and geographic barriers of Africa. Below-average international openness contributes to this issue.

In addition, there is a pronounced lack of ICT adoption, a vital requirement to attract visitors when travellers and industry players increasingly rely on technology. Visitors might also be put off by health and hygiene concerns, which is Sub-Saharan Africa's most substantial gap with global averages. The combination of all these barriers may explain the region's poor competitiveness performance on TTCI indicators related to natural and cultural resources, despite the widely acknowledged attractiveness of its nature.

On the one hand, many Sub-Saharan African economies have made great strides to improve their competitiveness. That's why growth in price competitiveness combined with improvements in other areas can attract more price-conscious visitors. Aside from price, the region's performance on other components of the T&T Policy and Enabling Conditions subindex also experienced improvements over 2017. The combination of the world's fastest regional growth on ICT readiness and international openness has also helped drive digital connectivity and improvements in air traffic. On the other hand, however, performance has declined when it comes to business environment, health and hygiene, human resource and labour market, tourist service infrastructure and natural and cultural resources. This has endangered progress made elsewhere. In the end, the region's performance varied greatly by subregion and country.

Subregion Analysis

Southern Africa is the most competitive of the three subregions, but experienced slow growth in competitiveness over the past two years. In 2019, it outperforms the broader regional average on 11 pillars. The subregion is also the most price-competitive in Sub-Saharan Africa, which is also its highest-ranking pillar. However, Southern Africa's biggest advantages over the other two subregions come from tourist services infrastructure and prioritization of travel & tourism, though the subregion does perform below the *global* average in both areas. Southern Africa's growth over its 2017 performance consisted of broad improvement in T&T-related policies and enabling conditions, especially price competitiveness and international openness. ICT readiness and tourist service infrastructure also improved, but this subregion's traditional lead in overall enabling environment and natural and cultural resources deteriorated. In particular, Southern Africa's Health and

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* World Travel & Tourism Council, Tourism Satellite Account Research and World Tourism Organization, UNWTO database, latest year available.

Hygiene pillar worsened, reinforcing the subregion's greatest disadvantage compared to the global average.

Southern Africa's growth is primarily due to the performance of **Lesotho,** which moved up four places in 2019 to a global rank of 124th. The country experienced jumps in price competitiveness (57th to 10th) and international openness (129th to 107th), caused by the lowest ticket and airport charges in the world as well as reduced visa requirements (110th to 28th). Three of the five other countries in Southern Africa that were ranked in 2017 lost places on the TTCI. **Botswana** experienced the subregion's largest decline, dropping seven places to rank 92nd globally due to a worsened enabling environment (83rd to 99th), infrastructure (89th to 99rd) and natural and cultural resources (70th to 67th). The lowest ranking member of Southern Africa is **Angola** (134th), ranking near the bottom on most pillars. However, **South Africa** (61st) currently accounts for approximately 70% of Southern Africa's T&T GDP and is the subregion's highest scorer on the TTCI, with a particularly strong lead over the countries in the rest of the region in areas related to cultural resources & business travel (23rd).

Eastern Africa is a close second to Southern Africa in terms of competitiveness but did experience stagnation since the last edition of the report. Overall, Eastern Africa tops the broader Sub-Saharan Africa average on nine pillars, ties on three, and is the top-ranked subregion on seven. Compared to the Sub-Saharan Africa average, it maintains a minor disadvantage regarding price competitiveness, which is still its highest-scoring pillar, and a larger gap on ICT readiness. Eastern Africa's most significant advantages over Southern and Western Africa comes from better ground and port infrastructure. However, it is on natural resources where the subregion outperforms the global average. Eastern Africa lost competitiveness on seven pillars. The biggest declines came from cultural resources and business travel, health and hygiene and tourist service infrastructure. However, these losses were offset by strong growth on price competitiveness and enhancements to air and ground infrastructure.

Of the 10 economies ranked in 2017, five decreased in competitiveness and all but one dropped in ranking. For example, **Rwanda** (107th) experienced the biggest decline, dropping 10 places, due mainly to worsening health conditions (112th to 129th) that were caused primarily by a spike in malaria (118th to 140th). **Burundi** (137th) is the lowest-ranked economy in Eastern Africa but had the highest percentage increase in competitiveness. Globally, it ranks last in terms of tourist service infrastructure and, in value terms, lags behind the Eastern Africa average in terms of T&T prioritization (134th). Burundi's increased competitiveness came from improved T&T enabling conditions and, in particular, price competitiveness, where it moved up seven places to 75th. The highest-scoring country in the subregion is **Mauritius** (54th), which is also the highest scorer in the entire Sub-Saharan Africa region. The country is Sub-Saharan Africa's top scorer when it comes to T&T prioritization—where it ranks 5th globally—due to government focus on the industry including relatively high government expenditure (4th) in the sector. Regarding T&T GDP size, Eastern Africa is dominated by

Ethiopia, Kenya and **Tanzania**, with Ethiopia (122nd) the largest of the three. The country has the subregion's largest population but lags behind Eastern Africa's average on the majority of the 14 TTCI pillars. Most notably, Ethiopia has an underdeveloped overall T&T infrastructure (128th).

Western Africa enjoyed the greatest increase in competitiveness in the region, yet it also ranks the lowest on the global TTCI. The subregion lags behind Southern and Eastern Africa in all areas apart from environmental sustainability, where it has a slight edge, and ICT readiness, where it ranks higher than Eastern Africa. Like the other African subregions, Western Africa scores highest on price competitiveness and lowest on cultural and business travel. Its greatest disadvantages, relative to the rest of Sub-Saharan Africa, come from lower prioritization of T&T, tourist services infrastructure and natural resources. Western Africa's competitiveness improvements from 2017 to 2019 are concentrated in nine pillars, with the most considerable improvement coming from increased international openness and ICT readiness. Moreover, Western Africa was the only subregion to show an overall improvement on the Health and Hygiene pillar. However, subregional economies experienced further decreased competitiveness on natural and cultural resources and tourist service infrastructure.

Eight of the 12 economies in the subregion covered in both the previous and current edition of the TTCI improved their competitiveness. Yet only four of them rose in the rankings, demonstrating that there is still a long way to go for the area to become genuinely competitive. **Nigeria** (129th) accounts for nearly half of the subregion's T&T GDP and is also its largest economy. However, it ranks in the middle of the pack regarding competitiveness and has the worst safety and security ranking (139th) in the entire Sub-Saharan Africa region. With a global rank of 88th, **Cape Verde** is Western Africa's highest-ranking member on the global index and 6th-highest in the Sub-Saharan Africa region. The country is more competitive than its sub-regional counterparts in all areas except the cultural (128th) and natural (136th) resources indicators. **Benin** experienced the largest growth in the subregion, moving up four spots to 123rd. The country drastically reduced its visa requirements, where it has risen to 7th globally. **Côte d'Ivoire** had the sharpest decline, dropping ten spots on the index to 119th, due primarily to deteriorating road and port infrastructure (67th to 98th). **Chad** (139th) ranks the lowest in the subregion due in part to the worst enabling conditions in the world and second to last performance in infrastructure.

Selected Country/Economy Analysis

Mauritius is Sub-Saharan Africa's highest-scoring member, moving up one spot in the global rankings to 54th. The country is one of the region's most developed and scores above regional and global averages in all aspects of the Enabling Environment subindex. It boasts a good business environment (17th)—defined by a low impact of taxes on business (8th) and profit (18th)—and an effective legal and administrative system. All of which encourages

investment in its T&T industry, which already benefits from high government prioritization (6th) and spending (4th) and effective tourism marketing (13th). Travel to Mauritius is also made easy by minimal visa requirements (5th), high-quality tourism infrastructure (3rd) and fairly good ground and port infrastructure (24th). Moreover, the country far outscores the rest of Sub-Saharan Africa on the Health and Hygiene pillar (58th) due to the number of physicians (62nd), hospital facilities, and water and sanitation services (50th) that are available to the population.

However, despite ranking high for the attractiveness of its natural assets (9th), including beaches, reefs and mountain rainforests, Mauritius still scores low on the Natural Resources pillar (106th). The country needs to reverse its recent decline in this area by expanding the amount of protected area (140th, revised down from 2017 figures) and protecting the large number of threatened wildlife (138th) that live in the country or it may risk losing its competitive edge. In addition, the country needs to keep improving its unfavorable price competitiveness (123rd) to enhance its attractiveness to potential visitors.

South Africa has, by far, the largest T&T industry in Sub-Saharan Africa ranking second regionally and 61st globally on the index. The country's most significant advantage is its combination of natural (15th) and cultural resources (23rd). While not optimal, the country also boasts a decent business environment (57th) and beats regional benchmarks regarding human resources and labour (81st), ICT readiness (75th) and overall infrastructure (60th). Nevertheless, the country still fell eight places on the index since 2017. South Africa has several critical issues undermining its overall competitiveness. It has one of the worst safety and security environments (132nd) in the world, and is plagued by high homicide rates (135th), a significant impact of crime on business (131st) and increasing fears of terrorism. Combined with poor health and hygiene conditions (113th), the security situation diminishes South Africa's attractiveness for visitors and investors alike. In addition, the country still scores low on the Environmental Sustainability pillar (124th), which is characterized by significant deforestation (124th) and declining environmental enforcement and regulatory stringency (46th to 66th), posing a risk to South Africa's natural resource advantage.

The country also experienced declines in the attractiveness of its natural assets (6th to 32nd). However, an increased number of world heritage sites (16th to 13th) and an upward revision for protected land (100th to 74th), helps offset this. The real fall in the nation's TTCI ranking is largely due to a worsening business environment, where the nation dropped 36 places because of a deterioration in performance on legal system and market competition (30th to 54th) and the impact of taxes on incentives to work and invest (48th to 78th). Government prioritization of tourism has also slipped, from 40th to 75th, with an apparent reduction on both marketing effectiveness (40th to 60th) and overall country brand strategy (5th to 23rd). Combined with declining quality of tourist service infrastructure (6th

to 32nd), South Africa is in danger of further erosion of its advantages. The nation's traditional lead on human resources also narrowed, with refined education data showing a lower level of primary education enrollment and broad drops in training and customer orientation metrics. If the country can maintain its lead on natural and cultural resources and infrastructure, and reverse recent losses in areas related to enabling environment—particularly indicators on safety—it will be able to remain one of Sub-Saharan Africa's key tourism economies.

Lesotho had the most impressive regional growth, jumping four places. However, the rise came off a low starting point, and the country still ranks 124th. Given that T&T directly accounts for over 7%* of the country's GDP—a large share relative to the rest of the world—it is not surprising that much of the growth in Lesotho's competitiveness came from improved T&T prioritization and enabling conditions (93rd to 41st), in which it now outcompetes the rest of Sub-Saharan Africa. The government is certainly prioritizing the travel and tourism industry (1st), with reduced visa requirements (110th to 28th) and drastic cuts in ticket taxes and airport charges (105th to 1st). Combined with improvements on already good environmental sustainability (22nd to 20th), Lesotho's gains in T&T prioritization (60th to 41st), international openness (129th to 107th) and new-found price competitiveness (57th to 10th), are positioning the country to further attract tourists and investment. In particular, the country has increasingly attractive natural assets (72nd to 47th).

Nevertheless, the country still needs to make many changes and refinements to its recent progress in order to become a truly competitive T&T hub. Nature-related tourism could be encouraged even further by expanding protected areas (136th) and boosting digital marketing (124th). Landlocked and surrounded by South Africa, the country's T&T industry is overwhelmingly dependent on South African tourists and external transport routes via its neighbor. Lesotho could increase the number of air service agreements (139th) and encourage better air transport infrastructure (139th), which would improve connectivity. The country depends on ground transport for most incoming travel and should make further investments as it ranks near the bottom of the TTCI on ground transport infrastructure (139th). Lesotho should also seek to boost outside investment by improving its business environment (106th)—which benefits from the 6th lowest corporate tax rate in the ranking—by cutting red tape and investing in human resources. The country's poor health and hygiene situation (the country suffers from the second-highest HIV prevalence rate), homicide rate (136th) and ICT readiness (120th) also need to be addressed in order to attract a greater and more diversified range of visitors.

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* World Travel & Tourism Council, Tourism Satellite Account Research, latest year available.

Part 3
Country/Economy Profiles

How to Read the Country/Economy Profiles

This section presents two-page profiles for 140 economies included in *The Travel & Tourism Competitiveness Report 2019*.

First Page

The first page is divided into three sections:

❶ Key Indicators

Presents several key statistics illuminating the context of a country's overall economy and its T&T sector. It includes the number of international tourist arrivals per year, international tourism inbound receipts (US$ millions), and the ratio between these two measures as of 2017. This data is provided by the UNWTO's *Yearbook of Tourism Statistics, Compendium of Tourism Statistics.* International tourism inbound receipts are defined as expenditures by international inbound visitors, including payments to national carriers for international transport. They include any other prepayment made for goods or services received in the destination country, and may also include receipts from same-day visitors, except when these are important enough to justify separate classification. For some economies and they do not include receipts for passenger transport items. This data is based on the Tourism Satellite Account (TSA) framework, developed by the UNWTO, the Organisation for Economic Co-operation and Development (OECD) and Eurostat. The TSA makes estimates comparable across countries and with other internationally recognized macroeconomic aggregates and compilations. This section also includes T&T industry GDP value, T&T industry value-added as share of the total economy, T&T industry employment as well as the T&T industry's employment share of the total economy. This data is estimated by the World Travel & Touring Council (WTTC), using the TSA approach. WTTC estimates that current and projected future several trips to a given country during a given period will be counted as a new arrival each time. More information regarding WTTC's TSA Research, along with details on the methodology and data, is available at https://www.wttc.org/publications/.

❷ Performance Overview

Presents the economy's performance on the overall Travel & Tourism Competitiveness Index (TTCI), the four main components (subindexes) and the 14 pillars. Performance on the individual indicators composing each pillar is shown on the second page of each Country/Economy Profile.
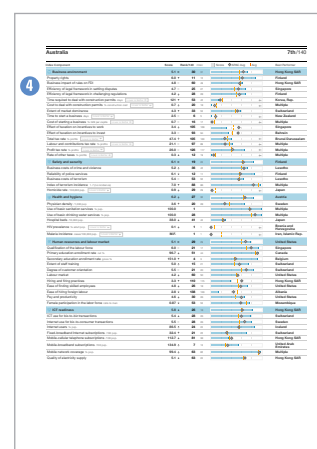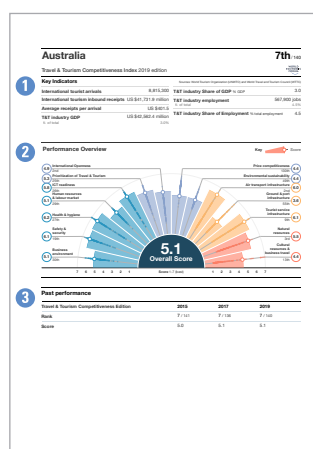
❸ Evolution of the TTCI Over Time

Shows the country's or economy's performance—including global rank and score—on the T&T Competitiveness Index over time.

Second Page

❹ The Travel & Tourism Competitiveness Index 2019 in detail

Details the economy's performance—global rank and score—on each of the 90 indicators that make up the TTCI. Indicators are organized by pillar. See Appendix B: Methodology and Appendix C: Data Definitions and Sources for details on the structure of the TTCI as well as for the methodology underpinning the index. Indicators derived from the World Economic Forum's Executive Opinion Survey are always expressed as scores on a 1–7 scale, with 7 being the most desirable outcome. For these indicators, units are omitted for the sake of readability. For indicators that are not derived from the survey, units are displayed next to the indicator name. Additional columns provide benchmarking metrics. Please note: indicator values that have been imputed will show up as 'n/a' and will not receive a rank. To see imputed values, see Appendix B.

Index of Countries/Economies

Country/Economy	Country/Economy	Country/Economy	Country/Economy
Albania	Dominican Republic	Lao PDR	Qatar
Algeria	Ecuador	Latvia	Romania
Angola	Egypt	Lebanon	Russian Federation
Argentina	El Salvador	Lesotho	Rwanda
Armenia	Estonia	Liberia	Saudi Arabia
Australia	Eswatini	Lithuania	Senegal
Austria	Ethiopia	Luxembourg	Serbia
Azerbaijan	Finland	Malawi	Seychelles
Bahrain	France	Malaysia	Sierra Leone
Bangladesh	Gambia, The	Mali	Singapore
Belgium	Georgia	Malta	Slovak Republic
Benin	Germany	Mauritania	Slovenia
Bolivia	Ghana	Mauritius	South Africa
Bosnia and Herzegovina	Greece	Mexico	Spain
Botswana	Guatemala	Moldova	Sri Lanka
Brazil	Guinea	Mongolia	Sweden
Brunei Darussalam	Haiti	Montenegro	Switzerland
Bulgaria	Honduras	Morocco	Taiwan, China
Burkina Faso	Hong Kong SAR	Mozambique	Tajikistan
Burundi	Hungary	Namibia	Tanzania
Cambodia	Iceland	Nepal	Thailand
Cameroon	India	Netherlands	Trinidad and Tobago
Canada	Indonesia	New Zealand	Tunisia
Cape Verde	Iran, Islamic Rep.	Nicaragua	Turkey
Chad	Ireland	Nigeria	Uganda
Chile	Israel	North Macedonia	Ukraine
China	Italy	Norway	United Arab Emirates
Colombia	Jamaica	Oman	United Kingdom
Congo, Democratic Rep.	Japan	Pakistan	United States
Costa Rica	Jordan	Panama	Uruguay
Côte d'Ivoire	Kazakhstan	Paraguay	Venezuela
Croatia	Kenya	Peru	Viet Nam
Cyprus	Korea, Rep.	Philippines	Yemen
Czech Republic	Kuwait	Poland	Zambia
Denmark	Kyrgyz Republic	Portugal	Zimbabwe

Individual country/economy profiles and additional features of the report are available online at **http://reports.weforum.org/ttcr.**

Appendix A
T&T Competitiveness Index 2019 Rankings

This appendix presents the detailed rankings and scores of the 4 subindexes and 14 pillars composing the T&T Competitiveness Index 2019 for all 140 economies covered this year.

The Travel & Tourism Competitiveness Index 2019, Overall Rank

Rank	Economy	Score
1	Spain	5.4
2	France	5.4
3	Germany	5.4
4	Japan	5.4
5	United States	5.3
6	United Kingdom	5.2
7	Australia	5.1
8	Italy	5.1
9	Canada	5.1
10	Switzerland	5.0
11	Austria	5.0
12	Portugal	4.9
13	China	4.9
14	Hong Kong SAR	4.8
15	Netherlands	4.8
16	Korea, Rep.	4.8
17	Singapore	4.8
18	New Zealand	4.7
19	Mexico	4.7
20	Norway	4.6
21	Denmark	4.6
22	Sweden	4.6
23	Luxembourg	4.6
24	Belgium	4.5
25	Greece	4.5
26	Ireland	4.5
27	Croatia	4.5
28	Finland	4.5
29	Malaysia	4.5
30	Iceland	4.5
31	Thailand	4.5
32	Brazil	4.5
33	United Arab Emirates	4.4
34	India	4.4
35	Malta	4.4
36	Slovenia	4.3
37	Taiwan, China	4.3
38	Czech Republic	4.3
39	Russian Federation	4.3
40	Indonesia	4.3
41	Costa Rica	4.3
42	Poland	4.2
43	Turkey	4.2
44	Cyprus	4.2
45	Bulgaria	4.2
46	Estonia	4.2
47	Panama	4.2
48	Hungary	4.2
49	Peru	4.2
50	Argentina	4.2
51	Qatar	4.1
52	Chile	4.1
53	Latvia	4.0
54	Mauritius	4.0
55	Colombia	4.0
56	Romania	4.0
57	Israel	4.0
58	Oman	4.0
59	Lithuania	4.0
60	Slovak Republic	4.0
61	South Africa	4.0
62	Seychelles	3.9
63	Viet Nam	3.9
64	Bahrain	3.9
65	Egypt	3.9
66	Morocco	3.9
67	Montenegro	3.9
68	Georgia	3.9
69	Saudi Arabia	3.9
70	Ecuador	3.9
71	Azerbaijan	3.8
72	Brunei Darussalam	3.8
73	Dominican Republic	3.8
74	Uruguay	3.8
75	Philippines	3.8
76	Jamaica	3.7
77	Sri Lanka	3.7
78	Ukraine	3.7
79	Armenia	3.7
80	Kazakhstan	3.7
81	Namibia	3.7
82	Kenya	3.6
83	Serbia	3.6
84	Jordan	3.6
85	Tunisia	3.6
86	Albania	3.6
87	Trinidad and Tobago	3.6
88	Cape Verde	3.6
89	Iran, Islamic Rep.	3.5
90	Bolivia	3.5
91	Nicaragua	3.5
92	Botswana	3.5
93	Mongolia	3.5
94	Honduras	3.5
95	Tanzania	3.4
96	Kuwait	3.4
97	Lao PDR	3.4
98	Cambodia	3.4
99	Guatemala	3.4
100	Lebanon	3.4
101	North Macedonia	3.4
102	Nepal	3.3
103	Moldova	3.3
104	Tajikistan	3.3
105	Bosnia and Herzegovina	3.3
106	Senegal	3.3
107	Rwanda	3.2
108	El Salvador	3.2
109	Paraguay	3.2
110	Kyrgyz Republic	3.2
111	Gambia, The	3.2
112	Uganda	3.2
113	Zambia	3.2
114	Zimbabwe	3.2
115	Ghana	3.1
116	Algeria	3.1
117	Venezuela	3.1
118	Eswatini	3.1
119	Côte d'Ivoire	3.1
120	Bangladesh	3.1
121	Pakistan	3.1
122	Ethiopia	3.0
123	Benin	3.0
124	Lesotho	3.0
125	Malawi	2.9
126	Guinea	2.9
127	Mozambique	2.9
128	Cameroon	2.9
129	Nigeria	2.8
130	Mali	2.8
131	Sierra Leone	2.8
132	Burkina Faso	2.8
133	Haiti	2.8
134	Angola	2.7
135	Mauritania	2.7
136	Congo, Democratic Rep.	2.7
137	Burundi	2.7
138	Liberia	2.6
139	Chad	2.5
140	Yemen	2.4

● Asia-Pacific   ● Europe and Eurasia   ● The Americas   ● Middle East and North Africa   ● Sub-Saharan Africa

Note: Scores range from 1 to 7, where 1 = worst and 7 = best.

Subindex A: Enabling Environment

Rank	Economy	Score
1	Switzerland	6.2
2	Hong Kong SAR	6.1
3	Finland	6.1
4	Iceland	6.0
5	Luxembourg	6.0
6	Germany	6.0
7	Singapore	5.9
8	Norway	5.9
9	Netherlands	5.9
10	Japan	5.9
11	Denmark	5.9
12	Austria	5.9
13	Sweden	5.9
14	New Zealand	5.8
15	United Kingdom	5.8
16	United States	5.8
17	United Arab Emirates	5.8
18	Estonia	5.8
19	Korea, Rep.	5.7
20	Australia	5.7
21	Canada	5.6
22	Lithuania	5.6
23	Belgium	5.6
24	Ireland	5.6
25	Taiwan, China	5.6
26	Czech Republic	5.6
27	Malta	5.6
28	France	5.6
29	Qatar	5.6
30	Israel	5.6
31	Portugal	5.5
32	Cyprus	5.5
33	Spain	5.5
34	Malaysia	5.5
35	Latvia	5.5

Rank	Economy	Score
36	Bahrain	5.5
37	Azerbaijan	5.4
38	Slovenia	5.4
39	Oman	5.4
40	Georgia	5.4
41	Saudi Arabia	5.4
42	Hungary	5.3
43	Mauritius	5.3
44	Kazakhstan	5.3
45	Poland	5.3
46	Russian Federation	5.3
47	Slovak Republic	5.3
48	Brunei Darussalam	5.3
49	Uruguay	5.3
50	Armenia	5.3
51	Romania	5.2
52	Bulgaria	5.2
53	China	5.2
54	Chile	5.2
55	Montenegro	5.2
56	Serbia	5.2
57	Italy	5.2
58	Greece	5.2
59	Kuwait	5.2
60	Costa Rica	5.1
61	Seychelles	5.1
62	Croatia	5.1
63	Thailand	5.0
64	Albania	5.0
65	Ukraine	5.0
66	Mongolia	4.9
67	Jordan	4.9
68	Moldova	4.9
69	Argentina	4.9
70	North Macedonia	4.9

Rank	Economy	Score
71	Morocco	4.8
72	Indonesia	4.8
73	Viet Nam	4.8
74	Panama	4.7
75	Trinidad and Tobago	4.7
76	Kyrgyz Republic	4.7
77	Tajikistan	4.7
78	Tunisia	4.7
79	Sri Lanka	4.7
80	Algeria	4.6
81	Bosnia and Herzegovina	4.6
82	Turkey	4.6
83	Iran, Islamic Rep.	4.6
84	Cape Verde	4.6
85	Ecuador	4.6
86	Egypt	4.5
87	Jamaica	4.5
88	Mexico	4.5
89	Brazil	4.5
90	Peru	4.5
91	Lebanon	4.5
92	Lao PDR	4.4
93	Philippines	4.4
94	Dominican Republic	4.4
95	Paraguay	4.4
96	Ghana	4.4
97	Colombia	4.4
98	India	4.4
99	Botswana	4.4
100	Namibia	4.4
101	Nicaragua	4.3
102	Nepal	4.3
103	Gambia, The	4.3
104	Rwanda	4.3
105	South Africa	4.2

Rank	Economy	Score
106	Cambodia	4.2
107	Bolivia	4.2
108	Bangladesh	4.2
109	Guatemala	4.1
110	Senegal	4.1
111	Kenya	4.1
112	Côte d'Ivoire	4.0
113	Benin	4.0
114	El Salvador	3.9
115	Honduras	3.9
116	Zambia	3.9
117	Lesotho	3.8
118	Eswatini	3.8
119	Pakistan	3.7
120	Tanzania	3.7
121	Cameroon	3.7
122	Guinea	3.7
123	Sierra Leone	3.7
124	Uganda	3.7
125	Zimbabwe	3.7
126	Ethiopia	3.7
127	Mauritania	3.7
128	Malawi	3.7
129	Liberia	3.6
130	Venezuela	3.6
131	Burkina Faso	3.6
132	Burundi	3.6
133	Angola	3.4
134	Mali	3.4
135	Haiti	3.4
136	Nigeria	3.3
137	Yemen	3.2
138	Congo, Democratic Rep.	3.2
139	Mozambique	3.1
140	Chad	3.0

● Asia-Pacific   ● Europe and Eurasia   ● The Americas   ● Middle East and North Africa   ● Sub-Saharan Africa

Note: Scores range from 1 to 7, where 1 = worst and 7 = best.

Subindex B: Travel & Tourism Policy and Enabling Conditions

Rank	Economy	Score
1	New Zealand	5.1
2	Singapore	5.0
3	Luxembourg	5.0
4	Indonesia	5.0
5	Costa Rica	4.9
6	Malta	4.9
7	Austria	4.9
8	Estonia	4.9
9	Panama	4.9
10	Spain	4.9
11	Malaysia	4.9
12	Norway	4.9
13	Ireland	4.9
14	Switzerland	4.9
15	Finland	4.8
16	Honduras	4.8
17	Hungary	4.8
18	Slovenia	4.8
19	Germany	4.8
20	Portugal	4.8
21	Chile	4.8
22	Croatia	4.8
23	France	4.8
24	Netherlands	4.8
25	Japan	4.8
26	Greece	4.8
27	Bulgaria	4.8
28	Australia	4.7
29	Latvia	4.7
30	Peru	4.7
31	Korea, Rep.	4.7
32	Nicaragua	4.7
33	Iceland	4.7
34	Colombia	4.7
35	Denmark	4.7

Rank	Economy	Score
36	Czech Republic	4.7
37	Hong Kong SAR	4.7
38	Cyprus	4.7
39	Lithuania	4.7
40	Georgia	4.6
41	Lesotho	4.6
42	Thailand	4.6
43	Mauritius	4.6
44	Canada	4.6
45	Egypt	4.6
46	Dominican Republic	4.6
47	Morocco	4.6
48	El Salvador	4.6
49	Ecuador	4.6
50	Mexico	4.6
51	Slovak Republic	4.6
52	United States	4.6
53	Philippines	4.6
54	Qatar	4.6
55	Poland	4.5
56	Turkey	4.5
57	Tunisia	4.5
58	Sweden	4.5
59	Belgium	4.5
60	Guatemala	4.5
61	Taiwan, China	4.5
62	Jordan	4.5
63	Cape Verde	4.5
64	Romania	4.5
65	Tanzania	4.5
66	Azerbaijan	4.5
67	Jamaica	4.5
68	Kenya	4.5
69	India	4.5
70	Ukraine	4.5

Rank	Economy	Score
71	Brunei Darussalam	4.5
72	Montenegro	4.4
73	United Arab Emirates	4.4
74	Armenia	4.4
75	Italy	4.4
76	Oman	4.4
77	United Kingdom	4.4
78	Cambodia	4.4
79	Viet Nam	4.4
80	Namibia	4.4
81	Uruguay	4.4
82	Botswana	4.4
83	Lao PDR	4.3
84	Sri Lanka	4.3
85	China	4.3
86	Bahrain	4.3
87	Nepal	4.3
88	Uganda	4.3
89	Rwanda	4.3
90	Eswatini	4.3
91	Serbia	4.3
92	Trinidad and Tobago	4.3
93	Lebanon	4.3
94	Moldova	4.3
95	Albania	4.3
96	Gambia, The	4.2
97	Mozambique	4.2
98	Kazakhstan	4.2
99	Paraguay	4.2
100	Iran, Islamic Rep.	4.2
101	Bolivia	4.2
102	Brazil	4.2
103	Seychelles	4.2
104	Kyrgyz Republic	4.2
105	Russian Federation	4.2

Rank	Economy	Score
106	Zimbabwe	4.1
107	South Africa	4.1
108	Haiti	4.1
109	Zambia	4.1
110	Tajikistan	4.1
111	Bosnia and Herzegovina	4.1
112	Senegal	4.0
113	Mongolia	4.0
114	Saudi Arabia	4.0
115	Argentina	4.0
116	Ethiopia	4.0
117	Ghana	4.0
118	Benin	3.9
119	Malawi	3.9
120	Israel	3.9
121	North Macedonia	3.8
122	Pakistan	3.8
123	Bangladesh	3.8
124	Kuwait	3.8
125	Nigeria	3.8
126	Mauritania	3.7
127	Sierra Leone	3.7
128	Angola	3.7
129	Guinea	3.7
130	Burkina Faso	3.6
131	Mali	3.6
132	Côte d'Ivoire	3.6
133	Venezuela	3.6
134	Algeria	3.6
135	Cameroon	3.5
136	Burundi	3.5
137	Chad	3.5
138	Liberia	3.4
139	Yemen	3.2
140	Congo, Democratic Rep.	3.0

● Asia-Pacific   ● Europe and Eurasia   ● The Americas   ● Middle East and North Africa   ● Sub-Saharan Africa

Note: Scores range from 1 to 7, where 1 = worst and 7 = best.

Subindex C: Infrastructure

Rank	Economy	Score	Rank	Economy	Score	Rank	Economy	Score	Rank	Economy	Score
1	United States	5.8	36	Czech Republic	4.5	71	Indonesia	3.5	106	Rwanda	2.6
2	Switzerland	5.8	37	Israel	4.5	72	Argentina	3.4	107	Moldova	2.5
3	Singapore	5.7	38	Turkey	4.4	73	Ukraine	3.4	108	Côte d'Ivoire	2.5
4	Spain	5.6	39	Bahrain	4.4	74	Ecuador	3.3	109	Bangladesh	2.5
5	United Kingdom	5.6	40	Panama	4.3	75	Uruguay	3.3	110	Tanzania	2.5
6	Canada	5.5	41	Mauritius	4.3	76	Egypt	3.3	111	Mongolia	2.4
7	Germany	5.5	42	Saudi Arabia	4.3	77	Kuwait	3.3	112	Paraguay	2.4
8	Japan	5.5	43	Slovenia	4.2	78	Sri Lanka	3.2	113	Zimbabwe	2.3
9	Hong Kong SAR	5.4	44	Estonia	4.1	79	Azerbaijan	3.2	114	Tajikistan	2.3
10	Netherlands	5.4	45	Hungary	4.1	80	Philippines	3.2	115	Algeria	2.3
11	France	5.4	46	Latvia	4.1	81	Armenia	3.2	116	Ghana	2.3
12	Austria	5.4	47	Russian Federation	4.0	82	Serbia	3.2	117	Venezuela	2.3
13	United Arab Emirates	5.3	48	Mexico	4.0	83	Jordan	3.2	118	Mozambique	2.3
14	Australia	5.2	49	Montenegro	4.0	84	Tunisia	3.1	119	Zambia	2.2
15	Portugal	5.2	50	Poland	4.0	85	Colombia	3.1	120	Mali	2.2
16	Korea, Rep.	5.1	51	Jamaica	4.0	86	Lebanon	3.1	121	Guinea	2.2
17	Italy	5.0	52	Oman	4.0	87	Viet Nam	3.1	122	Nepal	2.2
18	Luxembourg	5.0	53	Bulgaria	4.0	88	Albania	3.1	123	Benin	2.2
19	Iceland	5.0	54	China	3.9	89	Kazakhstan	3.0	124	Uganda	2.2
20	Ireland	4.9	55	India	3.8	90	Kenya	3.0	125	Nigeria	2.2
21	Belgium	4.9	56	Dominican Republic	3.8	91	North Macedonia	3.0	126	Angola	2.1
22	Norway	4.9	57	Costa Rica	3.8	92	Honduras	2.9	127	Cameroon	2.1
23	Denmark	4.9	58	Trinidad and Tobago	3.8	93	Botswana	2.8	128	Ethiopia	2.1
24	New Zealand	4.8	59	Lithuania	3.7	94	Iran, Islamic Rep.	2.8	129	Sierra Leone	2.1
25	Sweden	4.8	60	South Africa	3.7	95	Lao PDR	2.8	130	Haiti	2.1
26	Greece	4.8	61	Brunei Darussalam	3.7	96	Eswatini	2.8	131	Kyrgyz Republic	2.0
27	Qatar	4.8	62	Namibia	3.6	97	Bosnia and Herzegovina	2.8	132	Burkina Faso	2.0
28	Malta	4.7	63	Chile	3.6	98	Nicaragua	2.8	133	Lesotho	2.0
29	Finland	4.7	64	Cape Verde	3.6	99	Pakistan	2.7	134	Burundi	2.0
30	Seychelles	4.7	65	Peru	3.6	100	Senegal	2.7	135	Liberia	1.9
31	Croatia	4.7	66	Georgia	3.5	101	Cambodia	2.7	136	Malawi	1.9
32	Thailand	4.6	67	Brazil	3.5	102	Guatemala	2.7	137	Congo, Democratic Rep.	1.8
33	Cyprus	4.6	68	Slovak Republic	3.5	103	El Salvador	2.7	138	Mauritania	1.8
34	Taiwan, China	4.6	69	Morocco	3.5	104	Gambia, The	2.7	139	Chad	1.8
35	Malaysia	4.5	70	Romania	3.5	105	Bolivia	2.6	140	Yemen	1.7

● Asia-Pacific   ● Europe and Eurasia   ● The Americas   ● Middle East and North Africa   ● Sub-Saharan Africa

Note: Scores range from 1 to 7, where 1 = worst and 7 = best.

Subindex D: Natural and Cultural Resources

Rank	Economy	Score
1	China	6.1
2	France	5.9
3	Spain	5.7
4	Italy	5.7
5	Mexico	5.6
6	Brazil	5.6
7	Japan	5.3
8	Germany	5.3
9	India	5.0
10	United Kingdom	5.0
11	Australia	4.9
12	United States	4.9
13	Canada	4.4
14	Argentina	4.3
15	Portugal	4.0
16	Peru	3.9
17	South Africa	3.9
18	Indonesia	3.8
19	Colombia	3.8
20	Russian Federation	3.8
21	Thailand	3.7
22	Austria	3.6
23	Croatia	3.6
24	Korea, Rep.	3.6
25	Greece	3.4
26	Viet Nam	3.4
27	Turkey	3.3
28	Costa Rica	3.2
29	Switzerland	3.2
30	New Zealand	3.2
31	Malaysia	3.2
32	Belgium	3.1
33	Egypt	3.1
34	Poland	3.1
35	Bolivia	3.1

Rank	Economy	Score
36	Venezuela	3.1
37	Sweden	3.1
38	Netherlands	3.1
39	Tanzania	3.0
40	Hong Kong SAR	3.0
41	Ecuador	3.0
42	Kenya	3.0
43	Slovenia	2.9
44	Bulgaria	2.9
45	Denmark	2.8
46	Philippines	2.8
47	Chile	2.8
48	Panama	2.8
49	Romania	2.8
50	Ireland	2.7
51	Norway	2.7
52	Sri Lanka	2.7
53	Congo, Democratic Rep.	2.6
54	Morocco	2.6
55	Uganda	2.6
56	Nepal	2.6
57	Iran, Islamic Rep.	2.6
58	Taiwan, China	2.6
59	Slovak Republic	2.5
60	Hungary	2.5
61	Czech Republic	2.5
62	Mongolia	2.5
63	Finland	2.5
64	Zambia	2.5
65	Zimbabwe	2.4
66	Singapore	2.4
67	Botswana	2.3
68	Ethiopia	2.3
69	Côte d'Ivoire	2.3
70	Namibia	2.3

Rank	Economy	Score
71	Iceland	2.3
72	Cambodia	2.3
73	United Arab Emirates	2.3
74	Malawi	2.3
75	Guatemala	2.2
76	Dominican Republic	2.2
77	Luxembourg	2.2
78	Cameroon	2.2
79	Senegal	2.2
80	Nicaragua	2.2
81	Honduras	2.2
82	Malta	2.2
83	Oman	2.2
84	Kazakhstan	2.1
85	Uruguay	2.1
86	Guinea	2.1
87	Pakistan	2.1
88	Lao PDR	2.1
89	Ukraine	2.1
90	Algeria	2.1
91	Cyprus	2.1
92	Nigeria	2.1
93	Tajikistan	2.1
94	Albania	2.0
95	Israel	2.0
96	Azerbaijan	2.0
97	Kyrgyz Republic	2.0
98	Benin	2.0
99	Mozambique	2.0
100	Tunisia	2.0
101	Mali	2.0
102	Jamaica	2.0
103	Armenia	2.0
104	Estonia	2.0
105	Bangladesh	2.0

Rank	Economy	Score
106	Georgia	2.0
107	Montenegro	1.9
108	Ghana	1.9
109	Paraguay	1.9
110	Burkina Faso	1.9
111	Latvia	1.9
112	Serbia	1.9
113	Saudi Arabia	1.9
114	Lithuania	1.9
115	Rwanda	1.9
116	Chad	1.8
117	Mauritius	1.8
118	Seychelles	1.8
119	North Macedonia	1.8
120	Jordan	1.8
121	El Salvador	1.7
122	Gambia, The	1.7
123	Brunei Darussalam	1.7
124	Angola	1.7
125	Lebanon	1.7
126	Bosnia and Herzegovina	1.7
127	Qatar	1.6
128	Eswatini	1.6
129	Trinidad and Tobago	1.6
130	Sierra Leone	1.6
131	Burundi	1.6
132	Lesotho	1.6
133	Yemen	1.6
134	Mauritania	1.5
135	Cape Verde	1.5
136	Kuwait	1.5
137	Haiti	1.5
138	Liberia	1.4
139	Moldova	1.4
140	Bahrain	1.4

● Asia-Pacific ● Europe and Eurasia ● The Americas ● Middle East and North Africa ● Sub-Saharan Africa

Note: Scores range from 1 to 7, where 1 = worst and 7 = best.

Pillar 1: Business Environment

Rank	Economy	Score	Rank	Economy	Score	Rank	Economy	Score	Rank	Economy	Score
1	Hong Kong SAR	6.1	36	Chile	4.9	71	Turkey	4.4	106	Lesotho	4.1
2	Singapore	6.0	37	Thailand	4.9	72	Eswatini	4.4	107	Moldova	4.0
3	Switzerland	6.0	38	Morocco	4.9	73	Uruguay	4.4	108	Tanzania	4.0
4	United States	5.8	39	India	4.9	74	Serbia	4.4	109	Albania	4.0
5	Luxembourg	5.8	40	Austria	4.8	75	Lao PDR	4.4	110	Italy	4.0
6	United Kingdom	5.8	41	Belgium	4.8	76	Romania	4.4	111	Mali	4.0
7	Finland	5.7	42	Korea, Rep.	4.8	77	Kyrgyz Republic	4.4	112	Sierra Leone	4.0
8	Qatar	5.6	43	Jamaica	4.8	78	Trinidad and Tobago	4.4	113	Nepal	4.0
9	United Arab Emirates	5.6	44	Namibia	4.8	79	Sri Lanka	4.4	114	Malawi	4.0
10	Denmark	5.5	45	Ghana	4.8	80	Philippines	4.3	115	Lebanon	4.0
11	Malaysia	5.5	46	Brunei Darussalam	4.8	81	Côte d'Ivoire	4.3	116	Burundi	4.0
12	New Zealand	5.5	47	France	4.8	82	Burkina Faso	4.3	117	Cameroon	4.0
13	Netherlands	5.5	48	Seychelles	4.7	83	Mongolia	4.3	118	Algeria	3.9
14	Germany	5.4	49	Kazakhstan	4.7	84	North Macedonia	4.3	119	Greece	3.9
15	Japan	5.4	50	Indonesia	4.7	85	Gambia, The	4.3	120	Ethiopia	3.9
16	Bahrain	5.4	51	Panama	4.7	86	Senegal	4.3	121	Iran, Islamic Rep.	3.9
17	Mauritius	5.4	52	Lithuania	4.7	87	Slovenia	4.3	122	Cambodia	3.8
18	Iceland	5.3	53	China	4.7	88	Hungary	4.3	123	Croatia	3.8
19	Oman	5.3	54	Portugal	4.7	89	Tajikistan	4.3	124	Colombia	3.8
20	Norway	5.3	55	Kuwait	4.7	90	Paraguay	4.3	125	Ecuador	3.8
21	Sweden	5.3	56	Jordan	4.6	91	Poland	4.3	126	Mozambique	3.8
22	Saudi Arabia	5.2	57	South Africa	4.6	92	Russian Federation	4.3	127	Brazil	3.7
23	Ireland	5.2	58	Montenegro	4.6	93	Pakistan	4.2	128	Congo, Democratic Rep.	3.6
24	Georgia	5.2	59	Latvia	4.6	94	Bangladesh	4.2	129	El Salvador	3.6
25	Canada	5.2	60	Kenya	4.5	95	Uganda	4.2	130	Angola	3.5
26	Taiwan, China	5.1	61	Costa Rica	4.5	96	Guatemala	4.2	131	Yemen	3.5
27	Israel	5.1	62	Czech Republic	4.5	97	Guinea	4.2	132	Nicaragua	3.4
28	Azerbaijan	5.1	63	Cape Verde	4.5	98	Mexico	4.2	133	Mauritania	3.4
29	Estonia	5.1	64	Spain	4.5	99	Nigeria	4.2	134	Bosnia and Herzegovina	3.4
30	Australia	5.1	65	Benin	4.4	100	Peru	4.1	135	Argentina	3.3
31	Armenia	5.0	66	Bulgaria	4.4	101	Liberia	4.1	136	Zimbabwe	3.3
32	Malta	5.0	67	Viet Nam	4.4	102	Honduras	4.1	137	Haiti	3.0
33	Cyprus	4.9	68	Tunisia	4.4	103	Ukraine	4.1	138	Chad	2.8
34	Botswana	4.9	69	Zambia	4.4	104	Dominican Republic	4.1	139	Bolivia	2.8
35	Rwanda	4.9	70	Egypt	4.4	105	Slovak Republic	4.1	140	Venezuela	2.4

● Asia-Pacific   ● Europe and Eurasia   ● The Americas   ● Middle East and North Africa   ● Sub-Saharan Africa

Note: Scores range from 1 to 7, where 1 = worst and 7 = best.

Pillar 2: Safety and Security

Rank	Economy	Score
1	Finland	6.7
2	Iceland	6.5
3	Oman	6.5
4	Switzerland	6.4
5	Hong Kong SAR	6.4
6	Singapore	6.4
7	United Arab Emirates	6.3
8	Luxembourg	6.3
9	Portugal	6.3
10	New Zealand	6.3
11	Qatar	6.3
12	Estonia	6.2
13	Japan	6.2
14	Austria	6.2
15	Slovenia	6.1
16	Spain	6.1
17	Norway	6.1
18	Czech Republic	6.1
19	Australia	6.1
20	Brunei Darussalam	6.1
21	Canada	6.1
22	Malta	6.0
23	Saudi Arabia	6.0
24	Netherlands	6.0
25	Georgia	6.0
26	Taiwan, China	6.0
27	Ireland	6.0
28	Morocco	6.0
29	Romania	6.0
30	Korea, Rep.	5.9
31	Rwanda	5.9
32	Bahrain	5.9
33	Cyprus	5.9
34	Malaysia	5.9
35	Croatia	5.9

Rank	Economy	Score
36	Sweden	5.9
37	Lithuania	5.9
38	Azerbaijan	5.9
39	Hungary	5.8
40	Armenia	5.8
41	Germany	5.8
42	Latvia	5.8
43	Denmark	5.8
44	Kuwait	5.8
45	United Kingdom	5.8
46	Mauritius	5.8
47	Albania	5.8
48	Jordan	5.7
49	Chile	5.7
50	Gambia, The	5.7
51	France	5.7
52	Belgium	5.7
53	Algeria	5.6
54	Nicaragua	5.6
55	United States	5.6
56	Poland	5.6
57	Slovak Republic	5.6
58	Viet Nam	5.6
59	China	5.6
60	Tajikistan	5.6
61	Greece	5.6
62	Mongolia	5.6
63	Kazakhstan	5.6
64	Montenegro	5.6
65	Mauritania	5.6
66	Israel	5.5
67	Moldova	5.5
68	Ghana	5.5
69	Italy	5.5
70	Eswatini	5.5

Rank	Economy	Score
71	Serbia	5.5
72	Benin	5.4
73	Malawi	5.4
74	Iran, Islamic Rep.	5.4
75	Costa Rica	5.4
76	Bosnia and Herzegovina	5.4
77	Zimbabwe	5.4
78	Sri Lanka	5.4
79	Lesotho	5.4
80	Indonesia	5.4
81	Zambia	5.3
82	Liberia	5.3
83	Lao PDR	5.3
84	Panama	5.3
85	Uruguay	5.3
86	Senegal	5.3
87	Botswana	5.3
88	Ecuador	5.2
89	Bolivia	5.2
90	Tunisia	5.2
91	Nepal	5.2
92	Cape Verde	5.2
93	Bulgaria	5.2
94	Seychelles	5.2
95	North Macedonia	5.2
96	Kyrgyz Republic	5.2
97	Tanzania	5.2
98	Russian Federation	5.1
99	Argentina	5.1
100	Sierra Leone	5.1
101	Ethiopia	5.1
102	Cambodia	5.1
103	Namibia	5.0
104	Angola	5.0
105	Bangladesh	4.9

Rank	Economy	Score
106	Paraguay	4.9
107	Ukraine	4.8
108	Burkina Faso	4.8
109	Haiti	4.8
110	Burundi	4.8
111	Thailand	4.8
112	Egypt	4.8
113	Lebanon	4.8
114	Dominican Republic	4.7
115	Mozambique	4.7
116	Uganda	4.7
117	Cameroon	4.7
118	Peru	4.7
119	Kenya	4.6
120	Guinea	4.6
121	Côte d'Ivoire	4.6
122	India	4.5
123	Congo, Democratic Rep.	4.4
124	Brazil	4.3
125	Turkey	4.3
126	Mexico	4.2
127	Chad	4.2
128	Mali	4.0
129	Guatemala	4.0
130	Trinidad and Tobago	3.9
131	Jamaica	3.9
132	South Africa	3.9
133	Colombia	3.8
134	Pakistan	3.7
135	Philippines	3.6
136	Honduras	3.6
137	Venezuela	3.3
138	Yemen	3.2
139	Nigeria	3.1
140	El Salvador	3.0

● Asia-Pacific   ● Europe and Eurasia   ● The Americas   ● Middle East and North Africa   ● Sub-Saharan Africa

Note: Scores range from 1 to 7, where 1 = worst and 7 = best.

Pillar 3: Health and Hygiene

Rank	Economy	Score	Rank	Economy	Score	Rank	Economy	Score	Rank	Economy	Score
1	Austria	7.0	36	Romania	6.1	71	Qatar	5.3	106	Nepal	4.3
2	Germany	7.0	37	Moldova	6.1	72	Sri Lanka	5.3	107	Yemen	4.1
3	Lithuania	6.9	38	Mongolia	6.1	73	Oman	5.3	108	Cambodia	4.0
4	Czech Republic	6.9	39	Azerbaijan	6.1	74	Albania	5.3	109	Gambia, The	3.9
5	Bulgaria	6.7	40	Portugal	6.0	75	Malaysia	5.3	110	Mauritania	3.8
6	Russian Federation	6.7	41	Georgia	6.0	76	Algeria	5.2	111	Senegal	3.8
7	Hungary	6.6	42	North Macedonia	6.0	77	Colombia	5.2	112	Haiti	3.7
8	Switzerland	6.5	43	Taiwan, China	6.0	78	Chile	5.2	113	South Africa	3.7
9	France	6.5	44	Armenia	6.0	79	Ecuador	5.2	114	Namibia	3.5
10	Belgium	6.5	45	Hong Kong SAR	6.0	80	Tunisia	5.2	115	Kenya	3.4
11	Ukraine	6.5	46	Israel	6.0	81	Bahrain	5.2	116	Ethiopia	3.3
12	Kazakhstan	6.5	47	New Zealand	5.9	82	Panama	5.1	117	Côte d'Ivoire	3.3
13	Greece	6.5	48	Montenegro	5.8	83	Paraguay	5.1	118	Botswana	3.3
14	Argentina	6.5	49	Ireland	5.8	84	El Salvador	5.1	119	Burundi	3.2
15	Malta	6.5	50	United Kingdom	5.8	85	Costa Rica	5.1	120	Angola	3.2
16	Japan	6.4	51	United States	5.8	86	Venezuela	5.1	121	Liberia	3.1
17	Korea, Rep.	6.4	52	Canada	5.7	87	Dominican Republic	5.0	122	Eswatini	3.1
18	Norway	6.4	53	Saudi Arabia	5.7	88	Thailand	5.0	123	Ghana	3.0
19	Finland	6.4	54	Cyprus	5.7	89	Iran, Islamic Rep.	5.0	124	Lesotho	3.0
20	Latvia	6.4	55	Kyrgyz Republic	5.7	90	Egypt	5.0	125	Zimbabwe	3.0
21	Estonia	6.3	56	Trinidad and Tobago	5.7	91	Viet Nam	5.0	126	Tanzania	3.0
22	Croatia	6.3	57	Kuwait	5.6	92	Jamaica	4.9	127	Nigeria	2.9
23	Netherlands	6.3	58	Mauritius	5.6	93	Peru	4.9	128	Cameroon	2.8
24	Poland	6.3	59	Bosnia and Herzegovina	5.6	94	Philippines	4.8	129	Rwanda	2.8
25	Italy	6.3	60	Singapore	5.6	95	Bolivia	4.8	130	Chad	2.8
26	Serbia	6.3	61	Lebanon	5.6	96	Cape Verde	4.7	131	Malawi	2.7
27	Australia	6.2	62	China	5.6	97	Morocco	4.6	132	Zambia	2.6
28	Iceland	6.2	63	Tajikistan	5.5	98	Nicaragua	4.6	133	Guinea	2.6
29	Slovak Republic	6.2	64	Brunei Darussalam	5.5	99	Honduras	4.5	134	Mali	2.6
30	Sweden	6.2	65	Turkey	5.5	100	Lao PDR	4.5	135	Congo, Democratic Rep.	2.6
31	Luxembourg	6.2	66	United Arab Emirates	5.4	101	Pakistan	4.5	136	Uganda	2.5
32	Spain	6.2	67	Jordan	5.4	102	Indonesia	4.5	137	Benin	2.5
33	Denmark	6.2	68	Seychelles	5.4	103	Bangladesh	4.5	138	Burkina Faso	2.4
34	Uruguay	6.2	69	Brazil	5.4	104	Guatemala	4.5	139	Sierra Leone	2.3
35	Slovenia	6.2	70	Mexico	5.4	105	India	4.4	140	Mozambique	1.7

● Asia-Pacific   ● Europe and Eurasia   ● The Americas   ● Middle East and North Africa   ● Sub-Saharan Africa

Note: Scores range from 1 to 7, where 1 = worst and 7 = best.

Pillar 4: Human Resources and Labour Market

Rank	Economy	Score
1	United States	5.8
2	Switzerland	5.8
3	Germany	5.7
4	Iceland	5.6
5	Singapore	5.6
6	Denmark	5.6
7	Hong Kong SAR	5.6
8	Netherlands	5.6
9	United Kingdom	5.5
10	Sweden	5.5
11	Canada	5.5
12	Norway	5.5
13	Finland	5.5
14	Luxembourg	5.4
15	Malaysia	5.4
16	New Zealand	5.4
17	Ireland	5.3
18	Taiwan, China	5.3
19	Belgium	5.3
20	Austria	5.3
21	Israel	5.3
22	Azerbaijan	5.3
23	Japan	5.3
24	China	5.2
25	France	5.1
26	United Arab Emirates	5.1
27	Thailand	5.1
28	Cyprus	5.1
29	Australia	5.1
30	Portugal	5.1
31	Albania	5.1
32	Estonia	5.1
33	Lithuania	5.1
34	Qatar	5.1
35	Russian Federation	5.0

Rank	Economy	Score
36	Korea, Rep.	5.0
37	Philippines	5.0
38	Latvia	5.0
39	Seychelles	5.0
40	Slovenia	4.9
41	Spain	4.9
42	Bahrain	4.9
43	Czech Republic	4.9
44	Indonesia	4.9
45	Costa Rica	4.9
46	Chile	4.8
47	Viet Nam	4.8
48	Ukraine	4.8
49	Malta	4.8
50	Jamaica	4.8
51	Montenegro	4.8
52	Armenia	4.8
53	Poland	4.8
54	Georgia	4.7
55	Slovak Republic	4.7
56	Mauritius	4.7
57	Kazakhstan	4.7
58	Serbia	4.7
59	Greece	4.7
60	Ghana	4.7
61	Uruguay	4.7
62	Tajikistan	4.7
63	Italy	4.6
64	Saudi Arabia	4.6
65	Oman	4.6
66	Hungary	4.6
67	Lao PDR	4.6
68	Bulgaria	4.6
69	Brunei Darussalam	4.6
70	Benin	4.6

Rank	Economy	Score
71	Colombia	4.6
72	Peru	4.6
73	Romania	4.5
74	Trinidad and Tobago	4.5
75	Mexico	4.5
76	India	4.5
77	Argentina	4.5
78	Mongolia	4.5
79	Kenya	4.4
80	Moldova	4.4
81	South Africa	4.4
82	Cameroon	4.4
83	Nepal	4.4
84	Sri Lanka	4.4
85	Namibia	4.4
86	Rwanda	4.4
87	Dominican Republic	4.4
88	Brazil	4.3
89	Egypt	4.3
90	Ecuador	4.3
91	Kuwait	4.3
92	Botswana	4.3
93	Kyrgyz Republic	4.3
94	Cape Verde	4.2
95	Cambodia	4.2
96	Nicaragua	4.2
97	Turkey	4.2
98	Uganda	4.1
99	Morocco	4.1
100	Iran, Islamic Rep.	4.1
101	Tunisia	4.1
102	Algeria	4.1
103	Croatia	4.1
104	Burundi	4.1
105	Gambia, The	4.1

Rank	Economy	Score
106	Bosnia and Herzegovina	4.1
107	Guinea	4.1
108	North Macedonia	4.1
109	Panama	4.1
110	Sierra Leone	4.0
111	Jordan	4.0
112	Côte d'Ivoire	4.0
113	Malawi	4.0
114	Bolivia	4.0
115	Paraguay	3.9
116	Lebanon	3.9
117	Guatemala	3.9
118	Honduras	3.9
119	Zambia	3.8
120	Bangladesh	3.8
121	Eswatini	3.8
122	Congo, Democratic Rep.	3.8
123	El Salvador	3.7
124	Haiti	3.6
125	Tanzania	3.6
126	Lesotho	3.6
127	Venezuela	3.6
128	Ethiopia	3.6
129	Zimbabwe	3.6
130	Senegal	3.5
131	Mozambique	3.5
132	Nigeria	3.5
133	Burkina Faso	3.4
134	Liberia	3.4
135	Pakistan	3.4
136	Mali	3.2
137	Angola	3.2
138	Chad	3.2
139	Yemen	3.0
140	Mauritania	2.5

● Asia-Pacific　● Europe and Eurasia　● The Americas　● Middle East and North Africa　● Sub-Saharan Africa

Note: Scores range from 1 to 7, where 1 = worst and 7 = best.

Pillar 5: ICT Readiness

Rank	Economy	Score	Rank	Economy	Score	Rank	Economy	Score	Rank	Economy	Score
1	Hong Kong SAR	6.6	36	Qatar	5.6	71	Turkey	4.6	106	Nicaragua	3.6
2	Denmark	6.4	37	Costa Rica	5.6	72	Morocco	4.6	107	Senegal	3.6
3	Sweden	6.4	38	Portugal	5.5	73	Colombia	4.6	108	Nepal	3.5
4	United Arab Emirates	6.4	39	Kuwait	5.5	74	Moldova	4.6	109	Kenya	3.5
5	Switzerland	6.3	40	Poland	5.5	75	South Africa	4.6	110	Rwanda	3.4
6	Iceland	6.3	41	Italy	5.5	76	Panama	4.6	111	Bangladesh	3.4
7	Korea, Rep.	6.3	42	Slovenia	5.5	77	Bosnia and Herzegovina	4.5	112	Lao PDR	3.4
8	Norway	6.3	43	Brunei Darussalam	5.4	78	Ukraine	4.5	113	Honduras	3.4
9	Netherlands	6.3	44	Malaysia	5.4	79	Iran, Islamic Rep.	4.5	114	Gambia, The	3.4
10	Japan	6.2	45	Chile	5.4	80	Tunisia	4.4	115	Tajikistan	3.4
11	Luxembourg	6.2	46	Oman	5.3	81	Mexico	4.4	116	Mali	3.3
12	United Kingdom	6.2	47	Hungary	5.3	82	Philippines	4.4	117	Zambia	3.2
13	Finland	6.1	48	Russian Federation	5.3	83	Viet Nam	4.3	118	Guinea	3.2
14	Estonia	6.1	49	Thailand	5.2	84	Jamaica	4.3	119	Zimbabwe	3.2
15	Singapore	6.1	50	Saudi Arabia	5.2	85	Mongolia	4.3	120	Lesotho	3.2
16	Austria	6.1	51	Greece	5.2	86	Egypt	4.3	121	Sierra Leone	3.1
17	New Zealand	6.1	52	Montenegro	5.2	87	Ecuador	4.3	122	Mauritania	3.0
18	United States	6.0	53	Bulgaria	5.2	88	El Salvador	4.2	123	Pakistan	3.0
19	Germany	6.0	54	Croatia	5.2	89	Algeria	4.2	124	Uganda	3.0
20	France	5.9	55	Romania	5.2	90	Namibia	4.2	125	Tanzania	2.9
21	Cyprus	5.9	56	Serbia	5.1	91	Cape Verde	4.2	126	Burkina Faso	2.9
22	Israel	5.9	57	Trinidad and Tobago	5.0	92	Lebanon	4.1	127	Benin	2.9
23	Belgium	5.8	58	China	5.0	93	Ghana	4.1	128	Nigeria	2.9
24	Bahrain	5.8	59	Seychelles	5.0	94	Botswana	4.1	129	Cameroon	2.8
25	Malta	5.8	60	Kazakhstan	5.0	95	Peru	4.1	130	Yemen	2.4
26	Australia	5.8	61	Azerbaijan	5.0	96	Bolivia	4.1	131	Ethiopia	2.4
27	Spain	5.8	62	Mauritius	4.9	97	Guatemala	4.0	132	Angola	2.3
28	Canada	5.8	63	Georgia	4.9	98	Kyrgyz Republic	4.0	133	Eswatini	2.3
29	Uruguay	5.7	64	Argentina	4.9	99	Côte d'Ivoire	4.0	134	Chad	2.2
30	Ireland	5.7	65	Jordan	4.8	100	Dominican Republic	4.0	135	Malawi	2.2
31	Latvia	5.7	66	Brazil	4.8	101	Cambodia	3.9	136	Liberia	2.1
32	Czech Republic	5.7	67	Indonesia	4.7	102	Paraguay	3.9	137	Mozambique	2.1
33	Slovak Republic	5.7	68	Armenia	4.7	103	Sri Lanka	3.9	138	Haiti	1.8
34	Taiwan, China	5.6	69	Albania	4.7	104	Venezuela	3.6	139	Burundi	1.7
35	Lithuania	5.6	70	North Macedonia	4.7	105	India	3.6	140	Congo, Democratic Rep.	1.7

● Asia-Pacific   ● Europe and Eurasia   ● The Americas   ● Middle East and North Africa   ● Sub-Saharan Africa

Note: Scores range from 1 to 7, where 1 = worst and 7 = best.

Pillar 6: Prioritization of Travel & Tourism

Rank	Economy	Score
1	Malta	6.2
2	Jamaica	6.2
3	Cyprus	6.2
4	Iceland	6.1
5	Mauritius	6.1
6	Singapore	6.1
7	Dominican Republic	6.0
8	Spain	5.9
9	Seychelles	5.9
10	Indonesia	5.9
11	Hong Kong SAR	5.9
12	Portugal	5.7
13	Greece	5.6
14	New Zealand	5.6
15	Switzerland	5.6
16	Costa Rica	5.6
17	United States	5.5
18	Ireland	5.5
19	Norway	5.4
20	Estonia	5.4
21	Kenya	5.4
22	Austria	5.3
23	Japan	5.3
24	Uruguay	5.3
25	Australia	5.3
26	Morocco	5.2
27	Thailand	5.2
28	Georgia	5.2
29	Mexico	5.2
30	Sri Lanka	5.2
31	Egypt	5.2
32	Jordan	5.1
33	Slovenia	5.1
34	France	5.1
35	Hungary	5.1

Rank	Economy	Score
36	Gambia, The	5.1
37	Honduras	5.1
38	Luxembourg	5.1
39	Turkey	5.1
40	Canada	5.1
41	Lesotho	5.1
42	Paraguay	5.0
43	Albania	5.0
44	Cambodia	5.0
45	Tunisia	5.0
46	Germany	5.0
47	Israel	5.0
48	Nepal	5.0
49	Azerbaijan	5.0
50	Finland	5.0
51	Lebanon	5.0
52	Montenegro	5.0
53	Korea, Rep.	4.9
54	Panama	4.9
55	United Kingdom	4.9
56	Philippines	4.9
57	Croatia	4.9
58	Nicaragua	4.9
59	Tanzania	4.9
60	Netherlands	4.8
61	Botswana	4.8
62	Malaysia	4.8
63	Italy	4.8
64	Lao PDR	4.8
65	Namibia	4.8
66	China	4.8
67	Bulgaria	4.7
68	Oman	4.7
69	Cape Verde	4.7
70	Denmark	4.7

Rank	Economy	Score
71	United Arab Emirates	4.7
72	Peru	4.7
73	Chile	4.7
74	Armenia	4.7
75	Taiwan, China	4.7
76	Argentina	4.6
77	Eswatini	4.6
78	Latvia	4.6
79	Saudi Arabia	4.6
80	Ecuador	4.5
81	Sweden	4.5
82	Guatemala	4.5
83	South Africa	4.5
84	Bahrain	4.5
85	Mongolia	4.5
86	Russian Federation	4.4
87	Belgium	4.4
88	Qatar	4.4
89	Lithuania	4.3
90	Czech Republic	4.3
91	Kazakhstan	4.3
92	Ukraine	4.3
93	Uganda	4.3
94	India	4.3
95	Slovak Republic	4.3
96	Tajikistan	4.3
97	El Salvador	4.3
98	Poland	4.2
99	Zimbabwe	4.2
100	Viet Nam	4.1
101	Romania	4.1
102	Rwanda	4.1
103	Colombia	4.1
104	Bosnia and Herzegovina	4.1
105	Mozambique	4.0

Rank	Economy	Score
106	Brazil	4.0
107	Trinidad and Tobago	4.0
108	Zambia	3.9
109	Serbia	3.9
110	Kyrgyz Republic	3.8
111	Ghana	3.8
112	Ethiopia	3.8
113	Senegal	3.7
114	North Macedonia	3.7
115	Iran, Islamic Rep.	3.7
116	Bolivia	3.7
117	Moldova	3.7
118	Mali	3.7
119	Pakistan	3.6
120	Haiti	3.6
121	Bangladesh	3.6
122	Kuwait	3.6
123	Malawi	3.6
124	Benin	3.5
125	Sierra Leone	3.4
126	Venezuela	3.4
127	Brunei Darussalam	3.4
128	Nigeria	3.4
129	Chad	3.2
130	Angola	3.2
131	Burkina Faso	3.2
132	Algeria	3.1
133	Cameroon	3.0
134	Burundi	2.8
135	Mauritania	2.8
136	Guinea	2.7
137	Liberia	2.7
138	Côte d'Ivoire	2.6
139	Yemen	2.1
140	Congo, Democratic Rep.	1.9

● Asia-Pacific ● Europe and Eurasia ● The Americas ● Middle East and North Africa ● Sub-Saharan Africa

Note: Scores range from 1 to 7, where 1 = worst and 7 = best.

Pillar 7: International Openness

Rank	Economy	Score
1	New Zealand	5.5
2	Australia	4.9
3	Singapore	4.8
4	Chile	4.7
5	Colombia	4.6
6	Japan	4.6
7	El Salvador	4.6
8	Peru	4.5
9	Ireland	4.5
10	Malaysia	4.5
11	Panama	4.5
12	Iceland	4.4
13	Denmark	4.4
14	Luxembourg	4.3
15	Netherlands	4.3
16	Indonesia	4.3
17	Korea, Rep.	4.3
18	Germany	4.3
19	Honduras	4.3
20	Costa Rica	4.3
21	Nicaragua	4.2
22	France	4.2
23	United Kingdom	4.2
24	Portugal	4.2
25	Czech Republic	4.2
26	Hungary	4.2
27	Croatia	4.2
28	Belgium	4.1
29	Italy	4.1
30	Switzerland	4.1
31	Finland	4.1
32	Greece	4.1
33	Poland	4.1
34	Sweden	4.1
35	Norway	4.0

Rank	Economy	Score
36	Ecuador	4.0
37	United States	4.0
38	Jamaica	4.0
39	Austria	4.0
40	Lithuania	4.0
41	Latvia	4.0
42	Malta	4.0
43	Spain	3.9
44	Guatemala	3.9
45	Thailand	3.9
46	Romania	3.9
47	Slovak Republic	3.9
48	Mexico	3.9
49	Bulgaria	3.9
50	Haiti	3.9
51	India	3.8
52	Turkey	3.8
53	Hong Kong SAR	3.8
54	Cyprus	3.8
55	Ukraine	3.7
56	Brunei Darussalam	3.7
57	Slovenia	3.7
58	Viet Nam	3.7
59	Estonia	3.7
60	Taiwan, China	3.7
61	Canada	3.6
62	Mauritius	3.6
63	Trinidad and Tobago	3.6
64	Qatar	3.5
65	Philippines	3.5
66	Cambodia	3.5
67	Georgia	3.4
68	Jordan	3.3
69	Dominican Republic	3.3
70	Tanzania	3.3

Rank	Economy	Score
71	Serbia	3.2
72	Bolivia	3.2
73	Rwanda	3.2
74	Armenia	3.2
75	Cape Verde	3.2
76	China	3.1
77	Mozambique	3.1
78	Moldova	3.1
79	Azerbaijan	3.1
80	Morocco	3.1
81	Argentina	3.1
82	Uganda	3.0
83	United Arab Emirates	3.0
84	Zimbabwe	3.0
85	Kenya	3.0
86	Kyrgyz Republic	3.0
87	Lao PDR	3.0
88	Uruguay	3.0
89	Brazil	3.0
90	Ghana	3.0
91	Mauritania	2.9
92	Benin	2.9
93	Zambia	2.9
94	Bahrain	2.9
95	Sierra Leone	2.8
96	Senegal	2.8
97	Oman	2.8
98	Namibia	2.8
99	Paraguay	2.7
100	Sri Lanka	2.7
101	Nepal	2.7
102	Eswatini	2.7
103	Seychelles	2.7
104	Côte d'Ivoire	2.6
105	Ethiopia	2.6

Rank	Economy	Score
106	Tunisia	2.6
107	Lesotho	2.6
108	Israel	2.5
109	South Africa	2.5
110	Lebanon	2.5
111	Tajikistan	2.5
112	Malawi	2.5
113	Kazakhstan	2.5
114	Bangladesh	2.5
115	Montenegro	2.4
116	Albania	2.4
117	Bosnia and Herzegovina	2.4
118	Iran, Islamic Rep.	2.4
119	North Macedonia	2.3
120	Gambia, The	2.3
121	Botswana	2.3
122	Pakistan	2.2
123	Russian Federation	2.2
124	Egypt	2.2
125	Venezuela	2.2
126	Liberia	2.0
127	Angola	1.9
128	Mongolia	1.9
129	Kuwait	1.9
130	Nigeria	1.9
131	Cameroon	1.8
132	Burundi	1.8
133	Guinea	1.8
134	Chad	1.7
135	Mali	1.7
136	Burkina Faso	1.6
137	Saudi Arabia	1.6
138	Congo, Democratic Rep.	1.5
139	Algeria	1.5
140	Yemen	1.3

● Asia-Pacific　　● Europe and Eurasia　　● The Americas　　● Middle East and North Africa　　● Sub-Saharan Africa

Note: Scores range from 1 to 7, where 1 = worst and 7 = best.

Pillar 8: Price Competitiveness

Rank	Economy	Score	Rank	Economy	Score	Rank	Economy	Score	Rank	Economy	Score
1	Iran, Islamic Rep.	6.7	36	Georgia	5.7	71	Slovak Republic	5.4	106	Cameroon	5.0
2	Brunei Darussalam	6.6	37	Pakistan	5.7	72	Brazil	5.4	107	Canada	4.9
3	Egypt	6.5	38	Namibia	5.7	73	Estonia	5.4	108	Malta	4.9
4	Kazakhstan	6.3	39	Uganda	5.7	74	Sri Lanka	5.4	109	Argentina	4.9
5	Malaysia	6.3	40	Poland	5.7	75	Burundi	5.4	110	Kenya	4.9
6	Indonesia	6.2	41	Guinea	5.7	76	Czech Republic	5.4	111	Greece	4.9
7	Mongolia	6.2	42	Latvia	5.7	77	Paraguay	5.4	112	Mali	4.8
8	Algeria	6.2	43	China	5.7	78	Taiwan, China	5.4	113	Japan	4.8
9	Kyrgyz Republic	6.1	44	Bulgaria	5.7	79	Angola	5.3	114	Cyprus	4.8
10	Lesotho	6.1	45	Nicaragua	5.6	80	Rwanda	5.3	115	Congo, Democratic Rep.	4.8
11	Eswatini	6.1	46	Morocco	5.6	81	Zimbabwe	5.3	116	Liberia	4.8
12	Tunisia	6.1	47	Montenegro	5.6	82	Peru	5.3	117	Belgium	4.8
13	India	6.1	48	Turkey	5.6	83	Jordan	5.3	118	Chad	4.8
14	Botswana	6.0	49	Cambodia	5.6	84	Mexico	5.3	119	United States	4.7
15	Nepal	6.0	50	Kuwait	5.6	85	Bangladesh	5.3	120	Austria	4.7
16	Moldova	6.0	51	Romania	5.6	86	Mauritania	5.3	121	New Zealand	4.7
17	Yemen	6.0	52	Chile	5.6	87	Gambia, The	5.3	122	Finland	4.7
18	Qatar	5.9	53	South Africa	5.6	88	Hungary	5.3	123	Mauritius	4.6
19	Ukraine	5.9	54	Panama	5.6	89	Albania	5.3	124	Germany	4.6
20	Lao PDR	5.9	55	Tajikistan	5.6	90	Zambia	5.1	125	Netherlands	4.6
21	Saudi Arabia	5.9	56	Trinidad and Tobago	5.6	91	Slovenia	5.1	126	Ireland	4.6
22	Viet Nam	5.9	57	Haiti	5.6	92	Côte d'Ivoire	5.1	127	Hong Kong SAR	4.5
23	Azerbaijan	5.9	58	Mozambique	5.6	93	Costa Rica	5.1	128	France	4.5
24	Philippines	5.9	59	Malawi	5.6	94	Benin	5.1	129	Italy	4.4
25	Thailand	5.8	60	Ethiopia	5.5	95	Portugal	5.1	130	Australia	4.4
26	North Macedonia	5.8	61	Bolivia	5.5	96	Venezuela	5.1	131	Denmark	4.4
27	Russian Federation	5.8	62	Ecuador	5.5	97	Croatia	5.0	132	Sierra Leone	4.4
28	Bahrain	5.8	63	Honduras	5.5	98	Luxembourg	5.0	133	Jamaica	4.3
29	Colombia	5.8	64	United Arab Emirates	5.5	99	Senegal	5.0	134	Sweden	4.3
30	Armenia	5.7	65	Tanzania	5.5	100	Dominican Republic	5.0	135	Norway	4.2
31	Oman	5.7	66	Burkina Faso	5.5	101	Spain	5.0	136	Seychelles	3.9
32	El Salvador	5.7	67	Serbia	5.5	102	Singapore	5.0	137	Switzerland	3.7
33	Guatemala	5.7	68	Lebanon	5.5	103	Korea, Rep.	5.0	138	Iceland	3.6
34	Cape Verde	5.7	69	Nigeria	5.5	104	Ghana	5.0	139	Israel	3.6
35	Lithuania	5.7	70	Bosnia and Herzegovina	5.5	105	Uruguay	5.0	140	United Kingdom	3.2

● Asia-Pacific ● Europe and Eurasia ● The Americas ● Middle East and North Africa ● Sub-Saharan Africa

Note: Scores range from 1 to 7, where 1 = worst and 7 = best.

Pillar 9: Environmental Sustainability

Rank	Economy	Score	Rank	Economy	Score	Rank	Economy	Score	Rank	Economy	Score
1	Switzerland	6.0	36	Kenya	4.5	71	Mauritius	4.3	106	Saudi Arabia	4.0
2	Norway	5.8	37	Greece	4.5	72	Liberia	4.3	107	Iran, Islamic Rep.	3.9
3	Austria	5.7	38	Rwanda	4.5	73	Benin	4.3	108	Mexico	3.9
4	Luxembourg	5.6	39	Honduras	4.5	74	Nigeria	4.3	109	Guatemala	3.9
5	Finland	5.6	40	Serbia	4.5	75	Seychelles	4.3	110	Trinidad and Tobago	3.9
6	Netherlands	5.4	41	United Arab Emirates	4.5	76	Georgia	4.2	111	Cyprus	3.9
7	Denmark	5.4	42	Cape Verde	4.5	77	Chile	4.2	112	Mauritania	3.9
8	Slovenia	5.4	43	Guinea	4.5	78	Uruguay	4.2	113	Tajikistan	3.9
9	Germany	5.3	44	Morocco	4.5	79	Bolivia	4.2	114	Ukraine	3.9
10	France	5.3	45	Taiwan, China	4.4	80	Sierra Leone	4.2	115	Congo, Democratic Rep.	3.9
11	Sweden	5.2	46	Tunisia	4.4	81	Poland	4.2	116	Bangladesh	3.8
12	United Kingdom	5.2	47	Peru	4.4	82	Russian Federation	4.2	117	El Salvador	3.8
13	Estonia	5.2	48	Romania	4.4	83	Uganda	4.2	118	Kazakhstan	3.8
14	Croatia	5.1	49	Australia	4.4	84	Burkina Faso	4.2	119	Paraguay	3.8
15	Czech Republic	5.0	50	Tanzania	4.4	85	Chad	4.2	120	China	3.8
16	Canada	4.9	51	Cameroon	4.4	86	Portugal	4.2	121	Viet Nam	3.8
17	Costa Rica	4.9	52	Colombia	4.4	87	Nicaragua	4.2	122	Lao PDR	3.7
18	Ireland	4.9	53	Zambia	4.4	88	Bahrain	4.1	123	Kyrgyz Republic	3.7
19	Bulgaria	4.8	54	Qatar	4.4	89	Ghana	4.1	124	South Africa	3.7
20	Lesotho	4.8	55	Gambia, The	4.4	90	Malawi	4.1	125	Venezuela	3.7
21	Hungary	4.8	56	Japan	4.4	91	Dominican Republic	4.1	126	Turkey	3.7
22	Iceland	4.8	57	Oman	4.4	92	Côte d'Ivoire	4.1	127	Eswatini	3.7
23	Belgium	4.8	58	Botswana	4.3	93	Burundi	4.1	128	India	3.6
24	New Zealand	4.7	59	Israel	4.3	94	Angola	4.1	129	Pakistan	3.6
25	Spain	4.7	60	Jordan	4.3	95	Lebanon	4.1	130	Thailand	3.6
26	Montenegro	4.7	61	Singapore	4.3	96	Brunei Darussalam	4.1	131	Mongolia	3.6
27	Korea, Rep.	4.7	62	Albania	4.3	97	Azerbaijan	4.1	132	North Macedonia	3.6
28	Panama	4.7	63	Moldova	4.3	98	Ethiopia	4.1	133	Algeria	3.5
29	Malta	4.7	64	Italy	4.3	99	Zimbabwe	4.1	134	Nepal	3.5
30	Slovak Republic	4.7	65	Bosnia and Herzegovina	4.3	100	United States	4.1	135	Indonesia	3.5
31	Egypt	4.7	66	Mali	4.3	101	Armenia	4.0	136	Argentina	3.4
32	Latvia	4.7	67	Brazil	4.3	102	Sri Lanka	4.0	137	Jamaica	3.4
33	Hong Kong SAR	4.6	68	Namibia	4.3	103	Philippines	4.0	138	Yemen	3.4
34	Senegal	4.6	69	Ecuador	4.3	104	Kuwait	4.0	139	Cambodia	3.4
35	Lithuania	4.6	70	Mozambique	4.3	105	Malaysia	4.0	140	Haiti	3.3

● Asia-Pacific　● Europe and Eurasia　● The Americas　● Middle East and North Africa　● Sub-Saharan Africa

Note: Scores range from 1 to 7, where 1 = worst and 7 = best.

Pillar 10: Air Transport Infrastructure

Rank	Economy	Score
1	Canada	6.6
2	Australia	6.0
3	United States	5.9
4	United Arab Emirates	5.7
5	Norway	5.6
6	Hong Kong SAR	5.6
7	Singapore	5.5
8	Netherlands	5.2
9	United Kingdom	5.2
10	Spain	5.0
11	Switzerland	5.0
12	Sweden	5.0
13	Iceland	5.0
14	New Zealand	4.9
15	Finland	4.9
16	Germany	4.9
17	France	4.8
18	Greece	4.8
19	Japan	4.8
20	Turkey	4.7
21	Portugal	4.7
22	Thailand	4.6
23	Russian Federation	4.6
24	Korea, Rep.	4.6
25	Malaysia	4.6
26	Qatar	4.5
27	Panama	4.5
28	Ireland	4.5
29	Denmark	4.5
30	Italy	4.4
31	China	4.3
32	Seychelles	4.3
33	India	4.2
34	Austria	4.2
35	Saudi Arabia	4.1

Rank	Economy	Score
36	Belgium	4.1
37	Mexico	4.0
38	Indonesia	3.9
39	Malta	3.9
40	Taiwan, China	3.9
41	Cyprus	3.7
42	Brazil	3.7
43	Luxembourg	3.7
44	Croatia	3.6
45	Israel	3.6
46	Cape Verde	3.5
47	Bahrain	3.5
48	Latvia	3.5
49	Oman	3.4
50	Viet Nam	3.4
51	Czech Republic	3.4
52	Hungary	3.4
53	South Africa	3.3
54	Brunei Darussalam	3.3
55	Egypt	3.3
56	Poland	3.2
57	Mauritius	3.2
58	Morocco	3.2
59	Philippines	3.2
60	Montenegro	3.2
61	Trinidad and Tobago	3.1
62	Argentina	3.1
63	Costa Rica	3.1
64	Chile	3.1
65	Colombia	3.0
66	Dominican Republic	3.0
67	Namibia	2.9
68	Peru	2.8
69	Sri Lanka	2.8
70	Jordan	2.7

Rank	Economy	Score
71	Ukraine	2.7
72	Romania	2.7
73	Bulgaria	2.7
74	Kenya	2.7
75	Kazakhstan	2.7
76	Serbia	2.6
77	Kuwait	2.6
78	Azerbaijan	2.6
79	Slovenia	2.6
80	Lebanon	2.5
81	Georgia	2.5
82	Tunisia	2.5
83	Lithuania	2.5
84	Estonia	2.5
85	Jamaica	2.5
86	Iran, Islamic Rep.	2.5
87	Ecuador	2.4
88	Armenia	2.4
89	North Macedonia	2.4
90	Lao PDR	2.4
91	Cambodia	2.3
92	Uruguay	2.3
93	Nepal	2.3
94	Tanzania	2.2
95	Bolivia	2.2
96	Pakistan	2.2
97	Mongolia	2.2
98	Ethiopia	2.2
99	Algeria	2.2
100	Senegal	2.2
101	Eswatini	2.2
102	Tajikistan	2.2
103	Botswana	2.1
104	Moldova	2.1
105	Albania	2.1

Rank	Economy	Score
106	Honduras	2.1
107	Nicaragua	2.1
108	El Salvador	2.1
109	Côte d'Ivoire	2.1
110	Bosnia and Herzegovina	2.0
111	Bangladesh	2.0
112	Gambia, The	2.0
113	Slovak Republic	2.0
114	Mali	2.0
115	Ghana	2.0
116	Nigeria	2.0
117	Kyrgyz Republic	2.0
118	Rwanda	1.9
119	Guinea	1.9
120	Venezuela	1.8
121	Guatemala	1.8
122	Zimbabwe	1.8
123	Liberia	1.8
124	Zambia	1.8
125	Mozambique	1.8
126	Haiti	1.8
127	Uganda	1.7
128	Angola	1.7
129	Sierra Leone	1.7
130	Benin	1.7
131	Burundi	1.7
132	Cameroon	1.7
133	Mauritania	1.6
134	Congo, Democratic Rep.	1.6
135	Paraguay	1.6
136	Burkina Faso	1.6
137	Chad	1.5
138	Malawi	1.5
139	Lesotho	1.3
140	Yemen	1.2

● Asia-Pacific ● Europe and Eurasia ● The Americas ● Middle East and North Africa ● Sub-Saharan Africa

Note: Scores range from 1 to 7, where 1 = worst and 7 = best.

Pillar 11: Ground and Port Infrastructure

Rank	Economy	Score
1	Hong Kong SAR	6.4
2	Singapore	6.4
3	Netherlands	6.1
4	Switzerland	6.1
5	Japan	6.0
6	Germany	5.7
7	France	5.6
8	Luxembourg	5.5
9	Belgium	5.5
10	United Kingdom	5.4
11	Denmark	5.3
12	Spain	5.2
13	Austria	5.2
14	Bahrain	5.2
15	Korea, Rep.	5.2
16	Taiwan, China	5.1
17	Czech Republic	4.9
18	United States	4.9
19	Malta	4.8
20	Slovenia	4.8
21	Qatar	4.7
22	Italy	4.7
23	Sweden	4.7
24	Mauritius	4.6
25	Jamaica	4.6
26	Finland	4.5
27	Malaysia	4.5
28	India	4.5
29	Ireland	4.5
30	Estonia	4.5
31	United Arab Emirates	4.5
32	Cyprus	4.4
33	Israel	4.4
34	Oman	4.4
35	Seychelles	4.4

Rank	Economy	Score
36	Lithuania	4.3
37	Poland	4.3
38	Latvia	4.2
39	Portugal	4.2
40	Slovak Republic	4.2
41	Hungary	4.2
42	Trinidad and Tobago	4.0
43	Iceland	4.0
44	Azerbaijan	3.9
45	Canada	3.9
46	Norway	3.9
47	Croatia	3.9
48	China	3.9
49	Greece	3.8
50	New Zealand	3.8
51	Brunei Darussalam	3.8
52	Sri Lanka	3.7
53	Panama	3.7
54	Dominican Republic	3.6
55	Australia	3.6
56	Turkey	3.6
57	Ecuador	3.5
58	South Africa	3.5
59	Saudi Arabia	3.5
60	Bangladesh	3.5
61	Morocco	3.5
62	Chile	3.4
63	Rwanda	3.4
64	Egypt	3.4
65	Namibia	3.4
66	Indonesia	3.3
67	Montenegro	3.3
68	Russian Federation	3.3
69	Kenya	3.3
70	Gambia, The	3.3

Rank	Economy	Score
71	Kuwait	3.3
72	Thailand	3.3
73	Pakistan	3.3
74	Georgia	3.2
75	Mexico	3.2
76	Bulgaria	3.2
77	Ukraine	3.1
78	Honduras	3.1
79	Iran, Islamic Rep.	3.1
80	Eswatini	3.1
81	Albania	3.1
82	Cape Verde	3.1
83	Romania	3.1
84	Viet Nam	3.0
85	Serbia	3.0
86	Costa Rica	3.0
87	Kazakhstan	2.9
88	El Salvador	2.9
89	Jordan	2.9
90	Algeria	2.8
91	Armenia	2.8
92	Lebanon	2.8
93	Philippines	2.8
94	Senegal	2.8
95	Tanzania	2.8
96	Tajikistan	2.8
97	Uruguay	2.8
98	Côte d'Ivoire	2.8
99	Tunisia	2.8
100	Botswana	2.8
101	Nicaragua	2.8
102	Sierra Leone	2.7
103	Argentina	2.7
104	North Macedonia	2.6
105	Ghana	2.6

Rank	Economy	Score
106	Moldova	2.6
107	Peru	2.5
108	Burundi	2.5
109	Colombia	2.5
110	Lao PDR	2.5
111	Cambodia	2.5
112	Cameroon	2.5
113	Uganda	2.5
114	Brazil	2.4
115	Guatemala	2.4
116	Ethiopia	2.4
117	Zambia	2.4
118	Bosnia and Herzegovina	2.4
119	Liberia	2.3
120	Guinea	2.3
121	Paraguay	2.3
122	Zimbabwe	2.3
123	Benin	2.3
124	Burkina Faso	2.2
125	Mozambique	2.2
126	Mongolia	2.2
127	Bolivia	2.1
128	Malawi	2.1
129	Mali	2.1
130	Kyrgyz Republic	2.1
131	Nepal	2.0
132	Nigeria	2.0
133	Yemen	2.0
134	Venezuela	2.0
135	Congo, Democratic Rep.	2.0
136	Angola	2.0
137	Chad	1.9
138	Haiti	1.9
139	Lesotho	1.8
140	Mauritania	1.8

● Asia-Pacific   ● Europe and Eurasia   ● The Americas   ● Middle East and North Africa   ● Sub-Saharan Africa

Note: Scores range from 1 to 7, where 1 = worst and 7 = best.

Pillar 12: Tourist Service Infrastructure

Rank	Economy	Score
1	Portugal	6.7
2	Austria	6.7
3	Spain	6.6
4	United States	6.6
5	Croatia	6.5
6	Switzerland	6.2
7	United Kingdom	6.1
8	Canada	6.1
9	Australia	6.1
10	Italy	6.0
11	Iceland	6.0
12	Bulgaria	6.0
13	Germany	5.9
14	Thailand	5.9
15	Luxembourg	5.9
16	New Zealand	5.8
17	Ireland	5.8
18	Greece	5.8
19	Japan	5.7
20	France	5.7
21	Cyprus	5.7
22	United Arab Emirates	5.6
23	Korea, Rep.	5.6
24	Montenegro	5.5
25	Malta	5.5
26	Israel	5.4
27	Slovenia	5.4
28	Estonia	5.4
29	Costa Rica	5.4
30	Seychelles	5.4
31	Peru	5.3
32	Czech Republic	5.2
33	Belgium	5.2
34	Norway	5.1
35	Saudi Arabia	5.1

Rank	Economy	Score
36	Singapore	5.1
37	Turkey	5.0
38	Qatar	5.0
39	Mauritius	5.0
40	Jamaica	4.9
41	Georgia	4.9
42	Netherlands	4.8
43	Dominican Republic	4.8
44	Uruguay	4.8
45	Denmark	4.8
46	Mexico	4.8
47	Sweden	4.8
48	Taiwan, China	4.8
49	Hungary	4.8
50	Panama	4.7
51	Finland	4.7
52	Namibia	4.6
53	Bahrain	4.6
54	Romania	4.6
55	Argentina	4.5
56	Poland	4.5
57	Malaysia	4.5
58	Latvia	4.5
59	Brazil	4.5
60	Lithuania	4.4
61	Slovak Republic	4.4
62	Armenia	4.3
63	Chile	4.3
64	South Africa	4.3
65	Ukraine	4.3
66	Hong Kong SAR	4.3
67	Cape Verde	4.2
68	Tunisia	4.1
69	Russian Federation	4.1
70	Trinidad and Tobago	4.1

Rank	Economy	Score
71	Oman	4.1
72	Ecuador	4.0
73	Albania	4.0
74	Brunei Darussalam	4.0
75	Lebanon	4.0
76	Bosnia and Herzegovina	3.9
77	Serbia	3.9
78	Morocco	3.9
79	Kuwait	3.9
80	North Macedonia	3.9
81	Jordan	3.8
82	Colombia	3.8
83	Guatemala	3.8
84	Botswana	3.6
85	Philippines	3.6
86	China	3.5
87	Nicaragua	3.4
88	Honduras	3.4
89	Lao PDR	3.4
90	Kazakhstan	3.4
91	Bolivia	3.3
92	Sri Lanka	3.3
93	Cambodia	3.2
94	Paraguay	3.2
95	Egypt	3.2
96	Azerbaijan	3.2
97	Senegal	3.1
98	Indonesia	3.1
99	El Salvador	3.1
100	Eswatini	3.0
101	Venezuela	3.0
102	Zimbabwe	3.0
103	Kenya	2.9
104	Moldova	2.9
105	Mongolia	2.9

Rank	Economy	Score
106	Viet Nam	2.8
107	Lesotho	2.8
108	Iran, Islamic Rep.	2.8
109	India	2.8
110	Mozambique	2.8
111	Angola	2.7
112	Pakistan	2.7
113	Gambia, The	2.6
114	Côte d'Ivoire	2.6
115	Haiti	2.6
116	Mali	2.5
117	Zambia	2.5
118	Benin	2.5
119	Nigeria	2.5
120	Tanzania	2.4
121	Guinea	2.4
122	Rwanda	2.3
123	Ghana	2.3
124	Uganda	2.3
125	Burkina Faso	2.3
126	Nepal	2.2
127	Cameroon	2.2
128	Kyrgyz Republic	2.1
129	Mauritania	2.0
130	Malawi	2.0
131	Tajikistan	2.0
132	Congo, Democratic Rep.	1.9
133	Bangladesh	1.9
134	Sierra Leone	1.9
135	Yemen	1.9
136	Algeria	1.8
137	Chad	1.8
138	Ethiopia	1.7
139	Liberia	1.7
140	Burundi	1.7

● Asia-Pacific ● Europe and Eurasia ● The Americas ● Middle East and North Africa ● Sub-Saharan Africa

Note: Scores range from 1 to 7, where 1 = worst and 7 = best.

Pillar 13: Natural Resources

Rank	Economy	Score
1	Mexico	6.0
2	Brazil	5.8
3	Australia	5.5
4	China	5.1
5	United States	5.0
6	France	4.9
7	Italy	4.9
8	Costa Rica	4.9
9	Spain	4.8
10	Thailand	4.8
11	Canada	4.8
12	Tanzania	4.7
13	Peru	4.7
14	India	4.5
15	South Africa	4.5
16	Argentina	4.5
17	Indonesia	4.5
18	Kenya	4.5
19	Colombia	4.4
20	Croatia	4.4
21	United Kingdom	4.4
22	New Zealand	4.3
23	Ecuador	4.2
24	Austria	4.1
25	Japan	4.1
26	Slovenia	4.1
27	Bolivia	4.1
28	Venezuela	4.1
29	Congo, Democratic Rep.	4.1
30	Germany	4.1
31	Portugal	4.0
32	Panama	4.0
33	Nepal	3.9
34	Russian Federation	3.8
35	Viet Nam	3.8

Rank	Economy	Score
36	Philippines	3.8
37	Malaysia	3.8
38	Uganda	3.7
39	Switzerland	3.7
40	Bulgaria	3.7
41	Zambia	3.6
42	Hong Kong SAR	3.6
43	Sri Lanka	3.6
44	Zimbabwe	3.6
45	Greece	3.5
46	Namibia	3.5
47	Botswana	3.4
48	Slovak Republic	3.4
49	Côte d'Ivoire	3.3
50	Denmark	3.3
51	Norway	3.2
52	Cameroon	3.2
53	Chile	3.2
54	Sweden	3.2
55	Poland	3.2
56	Romania	3.2
57	Nicaragua	3.1
58	Iceland	3.1
59	Honduras	3.1
60	Guinea	3.1
61	Senegal	3.1
62	Mongolia	3.1
63	Morocco	3.1
64	Malawi	3.1
65	Ethiopia	3.0
66	Cambodia	3.0
67	Guatemala	3.0
68	Dominican Republic	3.0
69	Egypt	3.0
70	Lao PDR	2.9

Rank	Economy	Score
71	Finland	2.9
72	Albania	2.9
73	Tajikistan	2.9
74	Benin	2.9
75	Luxembourg	2.8
76	Malta	2.8
77	Turkey	2.8
78	Mozambique	2.8
79	Montenegro	2.7
80	Netherlands	2.7
81	Hungary	2.7
82	Chad	2.7
83	Burkina Faso	2.6
84	Jamaica	2.6
85	Seychelles	2.6
86	Ireland	2.6
87	Taiwan, China	2.6
88	Rwanda	2.6
89	Kazakhstan	2.6
90	Tunisia	2.6
91	Belgium	2.5
92	Ghana	2.5
93	Czech Republic	2.5
94	Kyrgyz Republic	2.5
95	Armenia	2.5
96	Uruguay	2.5
97	Cyprus	2.5
98	Paraguay	2.5
99	Iran, Islamic Rep.	2.4
100	Estonia	2.4
101	Latvia	2.4
102	Korea, Rep.	2.4
103	United Arab Emirates	2.4
104	Brunei Darussalam	2.4
105	Georgia	2.4

Rank	Economy	Score
106	Mauritius	2.4
107	Mali	2.3
108	Oman	2.3
109	Bangladesh	2.3
110	Pakistan	2.3
111	Israel	2.3
112	Nigeria	2.3
113	Gambia, The	2.3
114	Lithuania	2.3
115	Angola	2.2
116	Ukraine	2.2
117	Eswatini	2.2
118	El Salvador	2.2
119	Jordan	2.2
120	Singapore	2.2
121	Lesotho	2.2
122	North Macedonia	2.2
123	Azerbaijan	2.2
124	Burundi	2.1
125	Sierra Leone	2.1
126	Algeria	2.1
127	Serbia	2.1
128	Cape Verde	2.0
129	Mauritania	2.0
130	Lebanon	2.0
131	Trinidad and Tobago	2.0
132	Bosnia and Herzegovina	1.9
133	Saudi Arabia	1.9
134	Liberia	1.8
135	Yemen	1.8
136	Qatar	1.8
137	Kuwait	1.8
138	Haiti	1.8
139	Moldova	1.7
140	Bahrain	1.6

● Asia-Pacific　● Europe and Eurasia　● The Americas　● Middle East and North Africa　● Sub-Saharan Africa

Note: Scores range from 1 to 7, where 1 = worst and 7 = best.

Pillar 14: Cultural Resources and Business Travel

Rank	Economy	Score
1	China	7.0
2	France	6.8
3	Spain	6.7
4	Italy	6.5
5	Japan	6.5
6	Germany	6.5
7	United Kingdom	5.6
8	India	5.5
9	Brazil	5.4
10	Mexico	5.3
11	Korea, Rep.	4.8
12	United States	4.7
13	Australia	4.4
14	Argentina	4.2
15	Portugal	4.1
16	Canada	4.0
17	Turkey	3.8
18	Russian Federation	3.7
19	Belgium	3.7
20	Netherlands	3.4
21	Greece	3.3
22	Egypt	3.3
23	South Africa	3.2
24	Indonesia	3.2
25	Colombia	3.2
26	Austria	3.2
27	Peru	3.1
28	Poland	3.0
29	Viet Nam	2.9
30	Ireland	2.9
31	Sweden	2.9
32	Croatia	2.8
33	Iran, Islamic Rep.	2.8
34	Switzerland	2.8
35	Thailand	2.6

Rank	Economy	Score
36	Taiwan, China	2.6
37	Malaysia	2.6
38	Singapore	2.5
39	Czech Republic	2.4
40	Chile	2.4
41	Hong Kong SAR	2.4
42	Denmark	2.3
43	Hungary	2.3
44	Romania	2.3
45	United Arab Emirates	2.2
46	Norway	2.2
47	Morocco	2.2
48	Bulgaria	2.1
49	Venezuela	2.1
50	Bolivia	2.0
51	Algeria	2.0
52	Finland	2.0
53	New Zealand	2.0
54	Oman	2.0
55	Ukraine	1.9
56	Pakistan	1.9
57	Azerbaijan	1.9
58	Saudi Arabia	1.9
59	Mongolia	1.9
60	Nigeria	1.8
61	Philippines	1.8
62	Ecuador	1.8
63	Uruguay	1.8
64	Israel	1.7
65	Kazakhstan	1.7
66	Sri Lanka	1.7
67	Serbia	1.7
68	Slovenia	1.7
69	Cyprus	1.7
70	Mali	1.6

Rank	Economy	Score
71	Ethiopia	1.6
72	Costa Rica	1.6
73	Slovak Republic	1.6
74	Panama	1.6
75	Bangladesh	1.6
76	Cambodia	1.6
77	Luxembourg	1.6
78	Estonia	1.6
79	Georgia	1.5
80	Malta	1.5
81	Uganda	1.5
82	Kyrgyz Republic	1.5
83	Guatemala	1.5
84	Kenya	1.5
85	Iceland	1.5
86	Dominican Republic	1.5
87	Bosnia and Herzegovina	1.5
88	Malawi	1.5
89	Lithuania	1.4
90	Tunisia	1.4
91	Armenia	1.4
92	Qatar	1.4
93	Lebanon	1.4
94	Jamaica	1.4
95	Latvia	1.4
96	North Macedonia	1.4
97	Paraguay	1.4
98	Mauritius	1.3
99	Senegal	1.3
100	Ghana	1.3
101	Jordan	1.3
102	Nepal	1.3
103	Côte d'Ivoire	1.3
104	Honduras	1.3
105	Zimbabwe	1.3

Rank	Economy	Score
106	El Salvador	1.3
107	Tajikistan	1.3
108	Nicaragua	1.3
109	Yemen	1.3
110	Zambia	1.3
111	Lao PDR	1.3
112	Tanzania	1.3
113	Bahrain	1.2
114	Mozambique	1.2
115	Trinidad and Tobago	1.2
116	Botswana	1.2
117	Moldova	1.2
118	Albania	1.2
119	Cameroon	1.2
120	Congo, Democratic Rep.	1.2
121	Rwanda	1.2
122	Angola	1.2
123	Benin	1.2
124	Burkina Faso	1.2
125	Haiti	1.2
126	Namibia	1.2
127	Kuwait	1.1
128	Gambia, The	1.1
129	Guinea	1.1
130	Montenegro	1.1
131	Sierra Leone	1.1
132	Mauritania	1.1
133	Brunei Darussalam	1.1
134	Burundi	1.1
135	Liberia	1.1
136	Cape Verde	1.0
137	Chad	1.0
138	Seychelles	1.0
139	Lesotho	1.0
140	Eswatini	1.0

● Asia-Pacific   ● Europe and Eurasia   ● The Americas   ● Middle East and North Africa   ● Sub-Saharan Africa

Note: Scores range from 1 to 7, where 1 = worst and 7 = best.

Appendix B
Methodology of the TTCI 2019

This section provides details about the methodology of the 2019 edition of the Travel & Tourism Competitiveness Index (TTCI). It is composed of the following parts:

- **Composition and Calculation:** An overview of the index composition and calculation methodology.

- **Imputations:** An overview of imputations for missing indicator values.

- **Indicator Changes and Comparability:** An explanation of key changes in indicators from the 2017 edition of the TTCI.

- **Exclusion Filters:** An overview of indicators that include filters that exclude economy values and the economies impacted by them.

Composition and Calculation

The TTCI structure (see table below) is composed of 14 pillars organized into four subindexes: **A) Enabling Environment** (5 pillars): 1. Business Environment, 2. Safety and Security, 3. Health and Hygiene, 4. Human Resources and Labour Market, 5. ICT Readiness; **B) T&T Policy and Enabling Conditions** (4 pillars): 6. Prioritization of Travel & Tourism, 7. International Openness, 8. Price Competitiveness, 9. Environmental Sustainability; **C) Infrastructure** (3 pillars): 10. Air Transport Infrastructure, 11. Ground and Port Infrastructure, 12. Tourist Service Infrastructure; and **D) Natural and Cultural Resources** (2 pillars): 13. Natural Resources and 14. Cultural Resources and Business Travel.

Figure B1: Composition of the TTCI 2019
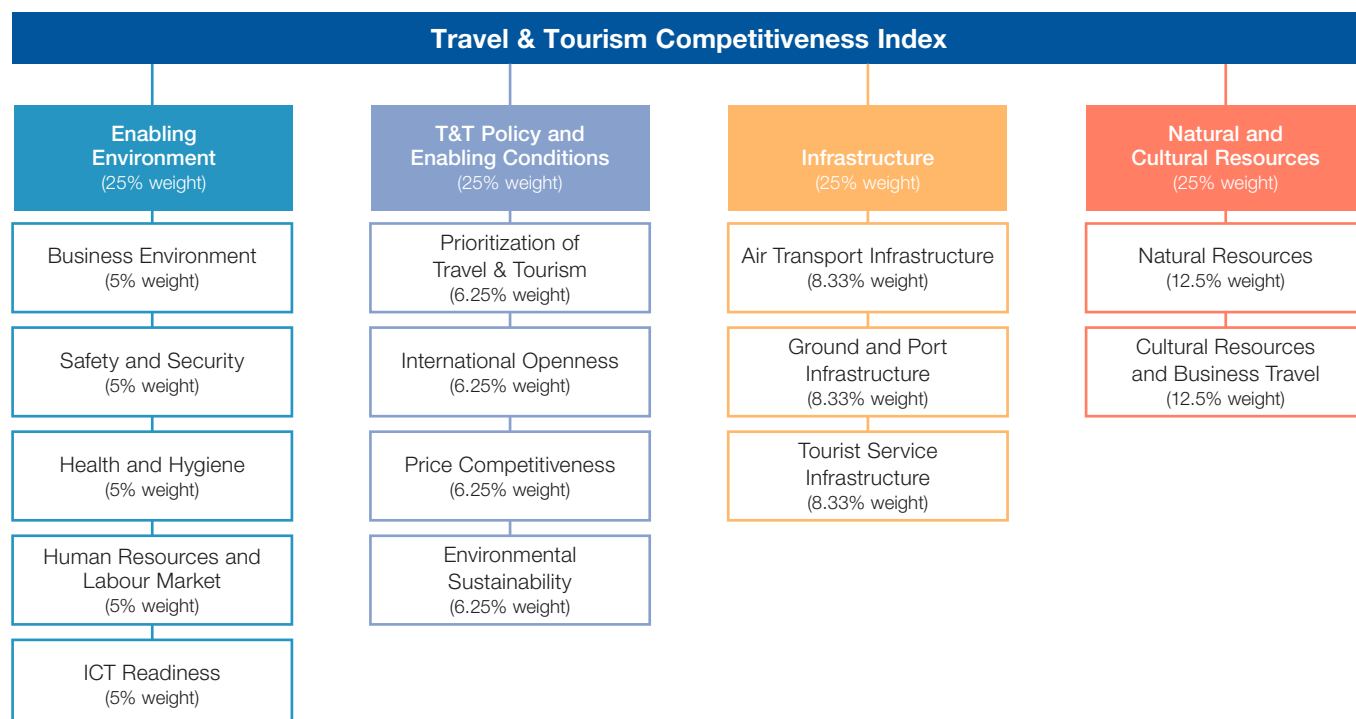
These 14 pillars are comprised of 90 indicators that are calculated on the basis of data derived from the Executive Opinion Survey (Survey) as well as quantitative data from other sources. The survey data is derived from responses to the World Economic Forum's Executive Opinion Survey and ranges in value from 1 (worst) to 7 (best).

Hard data (non-survey data) was collected from various sources, which are described in the Data Definitions and Sources section in Appendix C. All the data used in the calculation of the TTCI can be found by visiting the online version of the *Travel & Tourism Competitiveness Report 2019* online (http://reports.weforum.org/ttcr).

The TTCI is calculated as an average (arithmetic mean) of the four component subindexes, which are themselves calculated as averages (arithmetic means) of their pillars. Each of the pillars is calculated as an un-weighted average of the individual component variables. Note that the Human Resources and Labour Market pillar is the un-weighted average of its two subpillars: Qualification of the labour force and Labour market.

The number of pillars per subindex decreases as the subindex becomes more directly linked to travel and tourism. As a result, pillar weights increase. For instance, Tourist Service Infrastructure (pillar 12) has a higher weight than Business Environment (pillar 1) because such infrastructure is most relevant to the travel & tourism industry; while the data captured in the Business Environment pillar represents a broader set of factors that influence business and services in the country.

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. The standard formula for converting each hard data indicator 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 indicators for which a higher value indicates a worse outcome (e.g. 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.

Indicator List

The indicators that make up each pillar—and subpillar, if available—are described below. An asterisk identifies indicators *not derived* from the Executive Opinion Survey.

Subindex A: Enabling Environment

Pillar 1: Business Environment
1.01	Property rights
1.02	Impact of rules on FDI
1.03	Efficiency of legal framework in settling disputes[1]
1.04	Efficiency of legal framework in challenging regulations[1]
1.05	Time required to deal with construction permits*[1]
1.06	Cost to deal with construction permits*[1]
1.07	Extent of market dominance
1.08	Time required to start a business*[1]
1.09	Cost to start a business*[1]
1.10	Extent and effect of taxation on incentives to work[1]
1.11	Extent and effect of taxation on incentives to invest[1]
1.12	Total tax rate*

Pillar 2: Safety and Security
2.01	Business costs of crime and violence
2.02	Reliability of police services
2.03	Business costs of terrorism
2.04	Index of terrorism incidence*
2.05	Homicide rate*

Pillar 3: Health and Hygiene
3.01	Physician density*
3.02	Use of basic sanitation*[1]
3.03	Use of basic drinking water*[1]
3.04	Hospital beds*
3.05	HIV prevalence*
3.06	Malaria incidence*

Pillar 4: Human Resources and Labour Market

Qualification of the labour force
4.01	Primary education enrolment rate*
4.02	Secondary education enrolment rate*
4.03	Extent of staff training
4.04	Treatment of customers

Labour market
4.05	Hiring and firing practices
4.06	Ease of finding skilled employees
4.07	Ease of hiring foreign labour
4.08	Pay and productivity
4.09	Female labour force participation*

Pillar 5: ICT Readiness
5.01	ICT use for business-to-business transactions[1]
5.02	Internet use for business-to-consumer transactions[1]
5.03	Individuals using the internet*
5.04	Broadband internet subscribers*
5.05	Mobile telephone subscriptions*
5.06	Mobile broadband subscriptions*
5.07	Mobile network coverage*
5.08	Quality of electricity supply

Subindex B: T&T Policy and Enabling Conditions

Pillar 6: Prioritization of Travel & Tourism
6.01   Government prioritization of the T&T industry
6.02   T&T government expenditure*
6.03   Effectiveness of marketing to attract tourists
6.04   Comprehensiveness of annual T&T data*[1]
6.05   Timeliness of providing monthly/quarterly T&T data*[1]
6.06   Country Brand Strategy rating*

Pillar 7: International Openness
7.01   Visa requirements*
7.02   Openness of bilateral Air Service Agreements*
7.03   Number of regional trade agreements in force*

Pillar 8: Price Competitiveness
8.01   Ticket taxes and airport charges*
8.02   Hotel price index*
8.03   Purchasing power parity*
8.04   Fuel price levels*

Pillar 9: Environmental Sustainability
9.01   Stringency of environmental regulations[1]
9.02   Enforcement of environmental regulations[1]
9.03   Sustainability of travel and tourism industry development
9.04   Particulate matter (2.5) concentration*
9.05   Number of environmental treaty ratifications*
9.06   Baseline water stress*
9.07   Threatened species*
9.08   Forest cover change*[3]
9.09   Wastewater treatment*
9.10   Fish stock status*[3]

Subindex C: Infrastructure

Pillar 10: Air Transport Infrastructure
10.01   Quality of air transport infrastructure
10.02   Available seat kilometres, domestic*[2]
10.03   Available seat kilometres, international*[2]
10.04   Aircraft departures*[3]
10.05   Airport density*
10.06   Number of operating airlines*

Pillar 11: Ground and Port Infrastructure
11.01   Quality of roads
11.02   Road density*[1]
11.03   Paved road density*[1]
11.04   Quality of railroad infrastructure[1,3]
11.05   Railroad density*[1,3]
11.06   Quality of port infrastructure
11.07   Ground transport efficiency

Pillar 12: Tourist Service Infrastructure
12.01   Hotel rooms*
12.02   Quality of tourism infrastructure
12.03   Presence of major car rental companies*
12.04   Automated teller machines per adult population*

Subindex D: Natural and Cultural Resources

Pillar 13: Natural Resources
13.01   Number of World Heritage natural sites*
13.02   Total known species*
13.03   Total protected areas*
13.04   Natural tourism digital demand*
13.05   Attractiveness of natural assets

Pillar 14: Cultural Resources and Business Travel
14.01   Number of World Heritage cultural sites*[2]
14.02   Number of oral and intangible cultural heritage expressions*[2]
14.03   Number of sports stadiums*
14.04   Number of international association meetings*
14.05   Cultural and entertainment tourism digital demand*

Notes

1   These indicators are combined applying a simple average aggregation to form one single indicator. Consequently, they are implicitly weighted by a factor of 0.5.

2   Indicators 10.02, *Available seat kilometers, domestic*, and 10.03, *Available seat kilometers, international*, are summed to form a single indicator. Similarly, indicators 14.01, *Number of World Heritage cultural sites,* and 14.02, *Number of oral and intangible cultural heritage expressions*, are summed to form a single indicator.

3   Indicators 9.08, *Forest cover change*, 9.10, *Fish stock status*, 10.04, *Aircraft departures*, 11.04, *Quality of railroad infrastructure*, and 11.05, *Railroad density*, are subject to exclusion filters (see Exclusions Filters section on page 90).

Imputation

In order to present a more accurate representation of current conditions for the 2019 TTCI, values older than 2008 are imputed for the purpose of the calculation. The table below presents the imputation method and the imputed values by indicator. Note that in the Regional Profiles, rankings tables and other parts of the report that present raw indicator data, imputed values are not shown.

Table B1: TTCI 2019 imputation methodology and imputation values

Indicator		Imputation method	Economy	Imputed value
3.04	Hospital beds	Growth rate of peer group average applied to the latest country data. Peer group is based on region and income level defined by the World Bank and World Economic Forum.	Angola	7.89
			Congo, Democratic Rep.	5.76
			Lesotho	17.11
			Mauritania	5.26
			Nigeria	5.00
			Sierra Leone	2.88
4.01	Primary education enrolment rate	Imputed value from *The Global Competitiveness Report 2017-2018*; see Appendix D of that report.	Haiti	86.69
9.09	Wastewater treatment	2018 Environmental Protection Index imputation method. For further detail, see https://epi.envirocenter.yale.edu/downloads/epi2018technicalappendixv05.pdf.	Brunei Darussalam	0.38
			Seychelles	0.10
9.10	Fish stock status	Peer group mean. Group is "Eastern Asia-Pacific" as defined by World Economic Forum.	Hong Kong SAR	36.35
		2018 Environmental Protection Index imputation method. For further detail, see https://epi.envirocenter.yale.edu/downloads/epi2018technicalappendixv05.pdf.	Albania	41.11
			Bahrain	26.64
			Belgium	35.90
			Benin	23.05
			Bulgaria	41.11
			Cameroon	23.05
			Côte d'Ivoire	23.05
			Gambia, The	23.05
			Georgia	41.11
			Israel	26.64
			Kuwait	26.64
			Lebanon	26.64
			Lithuania	41.11
			Montenegro	41.11
			Qatar	26.64
			Romania	41.11
			Singapore	28.22
10.04	Aircraft departures	Eurostat economy air flight departure figures market share growth rates applied to available registered departure figures for Scandinavia (defined by the source as Denmark, Norway and Sweden).	Denmark	18.68
			Norway	56.55
			Sweden	22.81
		Linear regression forecast.	Eswatini	2.83
11.02	Road density	Estimate based on 2004 to 2016 motorway, highway, main, national, regional and secondary road growth.	Luxembourg	
			Italy	
		Linear regression forecast.	Côte d'Ivoire	Data redacted due to an agreement with the data provider.
			Yemen, Rep.	
			Liberia	
			Albania	
			Sierra Leone	
			Eswatini	
			Rwanda	
			Tajikistan	
		Mean growth rate of peer group. Peer group is based on region defined by World Economic Forum economies with poor time series were exluded from peer group).	Zambia	

Table B1: TTCI 2019 imputation methodology and imputed values *(continued)*

Indicator		Imputation method	Economy	Imputed value
11.03	**Paved road density**	Linear regression forecast.	Albania Armenia Chad Colombia Greece Italy Kuwait Kyrgyz Republic Liberia Luxembourg Qatar Venezuela Yemen Zambia Zimbabwe	Data redacted due to an agreement with the data provider.
		Mean growth rate of peer group. Peer group is based on region defined by World Economic Forum (countries with insufficient time series were excluded from peer group).	Portugal Tajikistan	
12.01	**Hotel rooms**	Linear regression forecast.	Canada	1.27
		Mean growth rate of peer group. Peer group is based on region and income level defined by the World Bank and World Economic Forum.	Haiti Malawi Mauritania Tajikistan Liberia	0.03 0.17 0.16 0.01 0.10

Indicator Changes and Comparability

As part of the constant refinement of the TTCI, indicators that are no longer being published, have been replaced by the source, or have had a significant change in methodology have been swapped out. Moreover, please note that even for indicators that have not been replaced, source data revisions can occur. Therefore, while efforts were made to keep TTCI results comparable from one edition to the next, refinement in indicators and data revisions could cause shifts in ranking and scores that are not due to actual performance.

Below are details of the changes for 2019:

- TTCI 2017 indicator 3.02, *Access to improved sanitation*, has been replaced by 3.02, *Use of basic sanitation*. The indicator has been changed because the World Health Organization no longer publishes the former and instead publishes the latter.

- TTCI 2017 indicator 3.03, *Access to improved drinking water*, has been replaced by 3.03, *Use of basic drinking water*. The indicator has been changed because the World Health Organization no longer publishes the former and instead publishes the latter.

- TTCI 2017 indicator 9.10, *Coastal shelf fishing pressure*, has been replaced by 9.10, *Fish stock status*. The indicator has been changed because the Environmental Protection Index has not used it since the 2014 edition, and has replaced it with the fish stock status. We also believe the new indicator is a better measure of marine environmental sustainability.

- Indicator 13.03, *Total protected areas*, was based on 2014 data in the 2017 edition of the TTCI. In subsequent years, the World Database on Protected Areas (WDPA) has updated and revised data standards. Some of these changes have led to substantial changes in indicator results, especially for marine protected areas. Therefore, because TTCI 2019 uses more updated data (mostly from 2017), comparability with previous figures are more difficult to make. For more information please visit: https://www.protectedplanet.net/.

Exclusion Filters

Certain indicators are subject to exclusion filters, which will lead to an "n/a" value even if there had been historical underlying data.

Table B2: Exclusion filters

Indicator	Exclusion filter	Affected economies	
9.08 Forest cover change	An economy will receive an "n/a" value if it meets the 2018 Environmental Protection Index criteria for "lack of forest", defined as total forested (≥ 30% canopy cover) area < 200 km2 and does not have underlying raw data. For further detail, see https://epi.envirocenter.yale.edu/downloads/epi2018technicalappendixv05.pdf.	Bahrain Iceland Kuwait Oman	Qatar Saudi Arabia United Arab Emirates Yemen
9.10 Fish stock status	An economy will receive an "n/a" value if it meets the 2018 Environmental Protection Index criteria for "lack of sea", defined as landlocked or coastline land area ratio < 0.01 and does not have underlying raw data. For further detail, see https://epi.envirocenter.yale.edu/downloads/epi2018technicalappendixv05.pdf.	Armenia Austria Azerbaijan Bolivia Bosnia and Herzegovina Botswana Burkina Faso Burundi Chad Congo, Democratic Rep. Czech Republic Ethiopia Hungary Jordan Kazakhstan Kyrgyz Republic Lao PDR Lesotho	Luxembourg North Macedonia Malawi Mali Moldova Mongolia Nepal Paraguay Rwanda Serbia Slovak Republic Slovenia Eswatini Switzerland Tajikistan Uganda Zambia Zimbabwe
10.04 Aircraft departures	An economy will receive an "n/a" value if it does not have a registered airline at the time of the World Economic Forum's research on registration (11/06/2019).	Guinea Lesotho Liberia	Mali North Macedonia Sierra Leone
11.04 Quality of railroad infrastructure and **11.05** Railroad density	An economy will receive an "n/a" value if it does not have an operational railroad service at the time of the World Economic Forum's research (20/05/2019).	Bahrain Brunei Darussalam Burundi Cape Verde Chad Costa Rica Cyprus Dominican Republic Ecuador El Salvador Gambia, The Guatemala Guinea Haiti Honduras Iceland Jamaica Kuwait	Lao PDR Lebanon Lesotho Liberia Malta Mauritius Nepal Nicaragua Oman Paraguay Qatar Rwanda Seychelles Sierra Leone Trinidad and Tobago United Arab Emirates Yemen

Appendix C
Data Definitions and Sources

This section complements the data tables by providing full descriptions and sources of all the indicators used for the calculation of the Travel & Tourism Competitiveness Index 2019 (TTCI).

The number of the indicator corresponds to the number of the data table that shows the ranks and scores for all countries/economies on this particular indicator. The data used in this report includes data derived from the Executive Opinion Survey as well as statistical data from other organizations. In the case of indicators derived from the Executive Opinion Survey (the Survey), the full question and associated answers are provided. For more details on Survey indicators, refer to Appendix B of *The Global Competitiveness Report 2018.*

For indicators sourced from other organizations or national sources, because of space limitations it is not possible to reproduce in this report all the additional information associated with specific data points. The data used in the computation of the TTCI 2019 represents the most recent and/or best data available at the time when it was collected. It is possible that data was updated or revised subsequently. Throughout the statistical tables in this publication, "n/a" denotes that the value is not available.

PILLAR 1: BUSINESS ENVIRONMENT

1.01 Property rights

Response to the survey question "In your country, how strong is the protection of property rights, including financial assets?" [1 = extremely weak, 7 = extremely strong] | 2017–2018 weighted average

Source: World Economic Forum, Executive Opinion Survey.

1.02 Impact of rules on FDI

Response to the survey question "In your country, how restrictive are rules and regulations on foreign direct investment (FDI)?" [1 = extremely restrictive, 7 = not restrictive at all] | 2017–2018 weighted average

Source: World Economic Forum, Executive Opinion Survey.

1.03 Efficiency of legal framework in settling disputes

Response to the survey question "In your country, how efficient are the legal and judicial systems for companies in settling disputes?" [1 = extremely inefficient, 7 = extremely efficient] | 2017–2018 weighted average

Source: World Economic Forum, Executive Opinion Survey.

1.04 Efficiency of legal framework in challenging regulations

Response to the survey question "In your country, how easy is it for private businesses to challenge government actions and/or regulations through the legal system?" [1 = extremely difficult, 7 = extremely easy] | 2017–2018 weighted average

Source: World Economic Forum, Executive Opinion Survey.

1.05 Time required to deal with construction permits

Total number of days required to deal with procedures necessary to build a warehouse | 2018

This indicator measures the median duration (in number of days) that local experts indicate is necessary in practice for a business to build a warehouse. The duration takes into account the following procedures: obtaining and submitting all relevant project-specific documents (for example, building plans, site maps and certificates of urbanism) to the authorities; hiring external third-party supervisors, engineers or inspectors; obtaining all necessary clearances, licenses, permits and certificates; submitting all required notifications; and requesting and receiving all necessary inspections as well as all procedures for obtaining connections for water and sewerage. For further details, visit http://www.doingbusiness.org/en/methodology.

Source: World Bank, *Doing Business 2019: Training for Reform.*

1.06 Cost to deal with construction permits

Cost is recorded as a percentage of the warehouse value | 2018

This indicator measures the cost associated with the procedures necessary for a business to build a warehouse (respect to its value). This cost is related to the following procedures: obtaining and submitting all relevant project-specific documents (for example, building plans, site maps and certificates of urbanism) to the authorities; hiring external third-party supervisors, engineers or inspectors; obtaining all necessary clearances, licenses, permits and certificates; submitting all required notifications; and requesting and receiving all necessary inspections as well as all procedures for obtaining connections for water and sewerage. For further details, visit http://www.doingbusiness.org/en/methodology.

Source: World Bank, *Doing Business 2019: Training for Reform.*

1.07 Extent of market dominance

Response to the survey question "In your country, how do you characterize corporate activity?" [1 = dominated by a few business groups, 7 = spread among many firms] | 2017–2018 weighted average

Source: World Economic Forum, Executive Opinion Survey.

1.08 Time required to start a business

Number of days required to start a business | 2018

This indicator measures the median duration that incorporation lawyers indicate is necessary to complete a procedure with minimum follow-up with government agencies and no unofficial payments. For further details, visit http://www.doingbusiness.org/en/methodology.

Source: World Bank, *Doing Business 2019: Training for Reform*.

1.09 Cost to start a business

Cost to start a business as a percentage of the economy's income (GNI) per capita | 2018

This indicator measures all official fees and fees for legal or professional services if such services are required by law or commonly used in practice. For further details, visit http://www.doingbusiness.org/en/methodology.

Source: World Bank, *Doing Business 2019: Training for Reform*.

1.10 Extent and effect of taxation on incentives to work

Response to the survey question "In your country, to what extent do taxes and social contributions reduce the incentive to work?" [1 = to a great extent, 7 = not at all] | 2017–2018 weighted average

Source: World Economic Forum, Executive Opinion Survey.

1.11 Extent and effect of taxation on incentives to invest

Response to the survey question "In your country, to what extent do taxes reduce the incentive to invest?" [1 = to a great extent, 7 = not at all] | 2017–2018 weighted average

Source: World Economic Forum, Executive Opinion Survey.

1.12 Total tax rate

A combination of profit tax, labour tax and contribution and other taxes (% of profits) | 2018

The total tax rate measures the amount of taxes and mandatory contributions payable by a medium-size company, expressed as a share of commercial profits. The total amount of taxes is the sum of five different types of taxes and contributions payable after accounting for deductions and exemptions: profit or corporate income tax, social contributions and labour taxes paid by the employer (for which all mandatory contributions are included, even if paid to a private entity such as a requited pension fund), property taxes, turnover taxes and other taxes (such as municipal fees and vehicle taxes). For more details about the methodology employed and the assumptions made to compute this indicator, visit http://www.doingbusiness.org/en/methodology.

Source: World Bank, *Doing Business 2019: Training for Reform*.

1.12a Labour and contributions tax rate

Amount of taxes and mandatory contributions on labour paid by the business as a percentage of commercial profits | 2018

Source: World Bank, *Doing Business 2019: Training for Reform*.

1.12b Profit tax rate

Amount of taxes on profits paid by the business as a percentage of commercial profit | 2018

Source: World Bank, *Doing Business 2019: Training for Reform*.

1.12c Other taxes rate

Amount of taxes and mandatory contributions paid by the business as a percentage of commercial profit that are not already included in the categories of profit or labour taxes | 2018

Source: World Bank, *Doing Business 2019: Training for Reform*.

PILLAR 2: SAFETY AND SECURITY

2.01 Business costs of crime and violence

Response to the survey question "In your country, to what extent does the incidence of crime and violence impose costs on businesses?" [1 = to a great extent, imposes huge costs; 7 = no costs at all] | 2017–2018 weighted average

Source: World Economic Forum, Executive Opinion Survey.

2.02 Reliability of police services

Response to the survey question "In your country, to what extent can police services be relied upon to enforce law and order?" [1 = not at all, 7 = to a great extent] | 2017–2018 weighted average

Source: World Economic Forum, Executive Opinion Survey.

2.03 Business costs of terrorism

Response to the survey question "In your country, to what extent does the threat of terrorism impose costs on businesses?" [1 = to a great extent, imposes huge costs; 7 = no costs at all] | 2017–2018 weighted average

Source: World Economic Forum, Executive Opinion Survey.

2.04 Index of terrorism incidence

Simple average of the number of terrorism-related casualties (injuries and fatalities) and the number of terrorist attacks, each normalized on a scale of 1 to 7 | 2013–2017 total

This index has been created on the basis of data contained in the START Database (National Consortium for the Study of Terrorism and Responses to Terrorism). It is the average of the total number of "terrorism attacks" during the 2013–2017 period and the total number of "terrorism casualties" (fatalities plus injured people) over the same period. Prior to aggregation, both totals were transformed on a scale ranging from 1 (most attacks/casualties) to 7 (no attack/casualty) using a min-max formula. On both measures, economies whose terrorism incidence is above the 95th percentile are assigned a transformed score of 1.

Source: World Economic Forum's calculations based on National Consortium for the Study of Terrorism and Responses to Terrorism (START), *Global Terrorism Database*, https://www.start.umd.edu/gtd.

2.05 Homicide rate

Number of homicide cases per 100,000 population | 2016 or most recent

The United Nations Office on Drugs and Crime (UNODC) collects statistics on homicide occurrences worldwide, pooling information from national sources as well as other international institutions such as Interpol, Eurostat, the Organization of American States, UNICEF and the World Health Organization (WHO).
Note: Higher value means worse outcome.

Source: United Nations Office on Drugs and Crime (UNODC).

PILLAR 3: HEALTH AND HYGIENE

3.01 Physician density

Physician density per 1,000 population | 2016 or most recent

This indicator measures the number of physicians in the country per 1,000 population. Physicians include generalist medical practitioners and specialist medical practitioners.

Sources: The World Bank, *World Development Indicators* database (accessed May 2019) and The World Health Organization, *Global Health Observatory Data Repository*.

3.02 Use of basic sanitation

People using at least basic sanitation services as a percentage of total population | 2015 or most recent

The percentage of people using at least basic sanitation services; that is, improved sanitation facilities that are not shared with other households. This indicator encompasses both people using basic sanitation services as well as those using safely managed sanitation services. Improved sanitation facilities include flush/pour flush to piped sewer systems, septic tanks or pit latrines; ventilated improved pit latrines, compositing toilets; or pit latrines with slabs.

Source: The World Bank, *World Development Indicators* database (accessed May 2019).

3.03 Use of basic drinking water

People using at least basic drinking water services as a percentage of total population | 2015 or most recent

The percentage of people using at least basic water services. This indicator encompasses both people using basic water services as well as those using safely managed water services. Basic drinking water services is defined as drinking water from an improved source, provided collection time is not more than 30 minutes for a round trip. Improved water sources include piped water, boreholes or tubewells, protected dug wells, protected springs, and packaged or delivered water.

Source: The World Bank, *World Development Indicators* database (accessed May 2019).

3.04 Hospital beds

Hospital beds per 10,000 population | 2013 or most recent

Hospital beds include inpatient beds available in public, private, general and specialized hospitals and rehabilitation centres. In most cases, beds for both acute and chronic care are included.

Source: The World Bank, *World Development Indicators* database (accessed May 2019).

3.05 HIV prevalence

HIV prevalence as a percentage of adults aged 15–49 years | 2017 or most recent

HIV prevalence refers to the percentage of people aged 15–49 who are infected with HIV at a particular point in time, no matter when infection occurred.

Source: Joint United Nations Programme on HIV and AIDS (UNAIDS), *AIDSINFO* database.

3.06 Malaria incidence

Estimated number of malaria cases per 100,000 population | 2017 or most recent

This indicator refers to the estimated number of new cases of malaria in the economy per 100,000 population. M.F. and S.L. indicate respectively that the World Health Organization (WHO) has declared the area malaria-free (M.F.) or that it has included it in the supplementary list (S.L.) of areas where malaria has never existed or has disappeared without specific measures. Hong Kong SAR and Taiwan, China have been considered malaria-free (M.F.) following the assessment by the United States Centers for Disease Control and Prevention (CDC).

Sources: The World Health Organization,*World Malaria Report*, 2018 edition, and the United States Centers for Disease Control and Prevention (CDC), *Yellow Book 2018.* In the Country/Economy profiles of these economies, the following abbreviations are used:*M.F.,* for malaria-free economies;*P.R.* indicates prevention of reintroduction phase; and *S.L.* means the economy is on the WHO's supplementary list.

PILLAR 4: HUMAN RESOURCES AND LABOUR MARKET

4.01 Primary education enrolment rate

Net primary education enrolment rate | 2017 or most recent

The reported value corresponds to the ratio of children of official school age (as defined by the national education system) who are enrolled in school to the population of the corresponding official school age. Primary education (ISCED level 1) provides children with basic reading, writing and mathematics skills along with an elementary understanding of such subjects as history, geography, natural science, social science, art and music.

Sources: UNESCO Institute for Statistics, Data Centre (accessed March 2019).

4.02 Secondary education enrolment rate

Gross secondary education enrolment rate | 2017 or most recent

The reported value corresponds to the ratio of total secondary enrolment, regardless of age, to the population of the age group that officially corresponds to the secondary education level. Secondary education (ISCED levels 2 and 3) completes the provision of basic education that began at the primary level and aims to lay the foundations for lifelong learning and human development by offering more subject- or skills-oriented instruction using more specialized teachers.

Sources: UNESCO Institute for Statistics, Data Centre (accessed January 2019).

4.03 Extent of staff training

Response to the survey question "In your country, to what extent do companies invest in training and employee development?" [1 = not at all, 7 = to a great extent] | 2017–2018 weighted average

Source: World Economic Forum, Executive Opinion Survey.

4.04 Treatment of customers

Response to the survey question "In your country, how well do companies treat customers?" [1 = poorly - mostly indifferent to customer satisfaction; 7 = extremely well - highly responsive to customers and seek customer retention] | 2017–2018 weighted average

Source: World Economic Forum, Executive Opinion Survey.

4.05 Hiring and firing practices

Response to the survey question "In your country, to what extent do regulations allow flexible hiring and firing of workers?" [1 = not at all, 7 = to a great extent] | 2017–2018 weighted average

Source: World Economic Forum, Executive Opinion Survey.

4.06 Ease of finding skilled employees

Response to the survey question "In your country, to what extent can companies find people with the skills required to fill their vacancies?" [1 = not at all, 7 = to a great extent] | 2017–2018 weighted average

Source: World Economic Forum, Executive Opinion Survey.

4.07 Ease of hiring foreign labour

Response to the survey question "In your country, how restrictive are regulations related to the hiring of foreign labour?" [1 = highly restrictive, 7 = not restrictive at all] | 2017–2018 weighted average

Source: World Economic Forum, Executive Opinion Survey.

4.08 Pay and productivity

Response to the survey question "In your country, to what extent is pay related to employee productivity?" [1 = not at all, 7 = to a great extent] | 2017–2018 weighted average

Source: World Economic Forum, Executive Opinion Survey.

4.09 Female labour force participation

Ratio of women to men in the labour force | 2018 or most recent

This indicator is the percentage of women aged 15–64 participating in the labour force divided by the percentage of men aged 15–64 participating in the labour force.

Source: International Labour Organization, *ILOSTAT* database (accessed February 2019).

PILLAR 5: ICT READINESS

5.01 ICT use for business-to-business transactions

Response to the survey question "In your country, to what extent do businesses use ICTs for transactions with other businesses?" [1 = not at all, 7 = to a great extent] | 2017–2018 weighted average

Source: World Economic Forum, Executive Opinion Survey.

5.02 Internet use for business-to-consumer transactions

Response to the survey question "In your country, to what extent do businesses use the internet for selling their goods and services to consumers?" [1 = not at all, 7 = to a great extent] | 2017–2018 weighted average

Source: World Economic Forum, Executive Opinion Survey.

5.03 Individuals using the internet

Percentage of individuals using the internet | 2017 or most recent

Internet users are people using the internet from any device (including mobile phones) in the last 12 months. Data is based on surveys generally carried out by national statistical offices or estimated based on the number of internet subscriptions.

Source: International Telecommunication Union, *World Telecommunication Indicators 2018*, December update.

5.04 Broadband internet subscribers

Fixed broadband internet subscriptions per 100 population | 2017 or most recent

This refers to total fixed (wired) broadband internet subscriptions (that is, subscriptions to high-speed access to the public internet—a TCP/IP connection—at downstream speeds equal to or greater than 256 kb/s).

Source: International Telecommunication Union, *World Telecommunication Indicators 2018*, December update.

5.05 Mobile telephone subscriptions

Number of mobile telephone subscriptions per 100 population | 2017 or most recent

A mobile-cellular telephone subscription refers to the number of subscriptions to a public mobile-telephone service that provide access to the PSTN using cellular technology. The indicator includes (and is split into) the number of postpaid subscriptions and the number of active prepaid accounts (i.e. that have been used during the last three months). The indicator applies to all mobile-cellular subscriptions that offer voice communications. It excludes subscriptions via data cards or USB modems; subscriptions to public mobile data services; private trunked mobile radio; telepoint; radio paging and telemetry services.

Source: International Telecommunication Union, *World Telecommunication Indicators 2018*, December update.

5.06 Mobile broadband subscriptions

Mobile broadband subscriptions per 100 population | 2017 or most recent

Active mobile-broadband subscriptions per 100 inhabitants.

Source: International Telecommunication Union, *World Telecommunication Indicators 2018*, December update.

5.07 Mobile network coverage

Percentage of total population covered by a mobile network signal | 2017 or most recent

This indicator measures the percentage of the population covered by a mobile-cellular network refers to the percentage of inhabitants within range of a mobile-cellular signal, irrespective of whether or not they are subscribers or users. This is calculated by dividing the number of inhabitants within range of a mobile-cellular signal by the total population and multiplying by 100. Note that this is not the same as the mobile subscription density or penetration.

Source: International Telecommunication Union, *World Telecommunication Indicators 2018*, December update.

5.08 Quality of electricity supply

Response to the survey question "In your country, how reliable is the electricity supply (lack of interruptions and lack of voltage fluctuations)?" [1 = extremely unreliable, 7 = extremely reliable] | 2017–2018 weighted average

Source: World Economic Forum, Executive Opinion Survey.

PILLAR 6: PRIORITIZATION OF TRAVEL & TOURISM

6.01 Government prioritization of the travel & tourism industry

Response to the survey question "How high a priority is the development of the travel and tourism industry for the government of your country?" [1 = not a priority at all, 7 = a top priority] | 2017–2018 weighted average

Source: World Economic Forum, Executive Opinion Survey.

6.02 T&T government expenditure

T&T government expenditure as a percentage of total government budget | 2018 or most recent

This indicator includes expenditures (transfers or subsidies) made by government agencies to provide T&T services such as cultural (e.g. art museums), recreational (e.g. national parks), clearance (e.g. immigration/ customs) and so on to visitors.

Source: World Travel & Tourism Council, Tourism Satellite Account Research 2019.

6.03 Effectiveness of marketing and branding to attract tourists

Response to the survey question "How effective are your country's marketing and branding campaigns in attracting tourists?" [1 = not effective at all, 7 = extremely effective] | 2017–2018 weighted average

Source: World Economic Forum, Executive Opinion Survey.

6.04 Comprehensiveness of annual T&T data

Number of data available (0 = no data, 120 = all selected indicators are available) | 2014–2017

This indicator shows how many of the yearly data provided by national administrations on 30 different concepts from the UNWTO Compendium of Tourism Statistics are available. It covers 2014 through 2017. The scores range from a minimum of 0 to a maximum of 120, where 120 can be obtained by a country providing data for all the 30 concepts in all of the four years taken into consideration.

Source: World Tourism Organization, UNWTO Database, latest available data, UNWTO, Madrid.

6.05 Timeliness of providing monthly/quarterly T&T data

Number of latest data available (0 = no data, 22.5 = data reported for all the periods considered) | 2017–2018

This indicator shows the availability of two key T&T indicators (international tourist arrivals and tourism receipts) on a monthly or quarterly basis, covering the period from October 2017 to December 2018. The UNWTO has calculated the score of each country based on the data included in the latest available UNWTO World Tourism Barometer by adding the number of months for which data on the international tourist arrivals are available to the number of months for which data on international tourism receipts are available. Half weight has been applied to the lower of the two scores, so the scores range from a minimum of 0 to a maximum of 22.5.

Source: World Tourism Organization, UNWTO Database, latest available data, UNWTO, Madrid.

6.06 Country Brand Strategy rating

This indicator evaluates the accuracy of the strategy of National Tourism Organizations (NTO) by a formula that compares the most popular brandtags (as measured by the proprietary Digital Demand-D2 tool) for a specific country to the brandtags most heavily promoted by that country's NTO. A country brand receives a higher rating if that country's NTO focuses its strategic and promotional positioning on the tourism-related brandtags with the highest demand (as measured by total online searches) from international tourists. A poor rating can suggest either the inappropriate promotion of the least popular brandtags (as measured by total online searches) by an NTO or the lack of focus on the brandtags in highest demand.

Source: Bloom Consulting based on *Country Brand Ranking, Tourism Edition*. Available at https://www.bloom-consulting.com/en/country-brand-ranking.

PILLAR 7: INTERNATIONAL OPENNESS

7.01 Visa requirements

Visa requirements for entry in the destination country for a tourism visit of a limited duration for visitors from worldwide source markets (100 = no visa required for visitors from all source markets, 0 = traditional visa required for visitors from every source market) | 2018

This indicator measures to what extent a destination country is facilitating inbound tourism through its visa policy, distinguishing whether the country can be visited without a visa, a visa can be obtained on arrival or an electronic visa is available. It is calculated as a percentage of the world population that is exempt from a visa or is eligible for visa on arrival or electronic visa when visiting the destination country, where: A) the population of source markets that can visit the destination country without a visa is fully counted (i.e. weight 1); B) the population of source markets that can obtain a visa on arrival when entering the destination country is weighted by 0.7; and C) the population of source markets that can use an electronic visa is weighted by 0.5. The indicator is consistent with the UNWTO's *Visa openness report 2015* that can be downloaded from https://www.e-unwto.org/doi/book/10.18111/9789284417384.

Source: World Tourism Organization, UNWTO Database, latest available data, UNWTO, Madrid.

7.02 Openness of bilateral Air Service Agreements

Index measuring the average openness of air service agreements (0 = most restricted, 38 = most liberal) | 2011

This index measures the weighted average openness of all bilateral Air Service Agreements (ASAs) concluded by International Civil Aviation Organization (ICAO) signatories as registered in ICAO's World's Air Services Agreements (WASA) database (2010 update). The weights are the bilateral scheduled passenger traffic taking place under each ASA. Regulatory data come from ICAO's WASA database and traffic data were obtained from IATA.

Source: World Trade Organization, based on ICAO and IATA data.

7.03 Number of regional trade agreements in force

Number of goods (RTAs) and services (EIAs) notifications | 2019

This indicator assesses the level of openness of a country to foreign goods and services as measured by the sum of the number of Regional Trade Agreements (RTA) and the number of Economic Integration Agreements (EIA) in force to the WTO. Members entering into RTAs are required to notify RTA to the WTO, either under Article XXIV of the GATT 1994 or the Enabling Clause (for RTAs covering trade in goods), or under Article V of the GATS (for RTAs covering trade in services). In a case of an RTA covering both goods and services, two notifications are required. The notification should be made following ratification of the RTA and before the application of preferential treatment between the parties.

Source: World Trade Organization, *Regional Trade Agreements Information System (RTA-IS)*, available at http://rtais.wto.org/UI/PublicMaintainRTAHome.aspx.

PILLAR 8: PRICE COMPETITIVENESS

8.01 Ticket taxes and airport charges

Index of relative cost of access (ticket taxes and airport charges) to international air transport services (0 = highest cost, 100 = lowest cost) | 2018 or most recent

This index measures the relative cost of access to international air transport services based on the level of airport charges, passenger ticket taxes and value-added taxation. It reflects the costs associated with narrow-body and wide-body passenger plane arrival and departure at the major international airports in each country. Charges include landing, terminal navigation and passenger and security charges as listed in the IATA Airport and Air Navigation Charges manual. Ticket taxes applicable to international travel were applied as described in the IATA List of Ticket and Airport Taxes and Fees manual. Per-passenger charges were calculated by applying a 75% load factor to a typical seating configuration of each type of aircraft. Value-added taxes (VATs) were calculated based on an average ticket price for each country, applied to half of the departing passengers, because the VAT is normally charged only on itineraries originating in the country concerned. A higher score indicates a lower level of charges and taxes.

Source: International Air Transport Association, *SRS Analyser*.

8.02 Hotel price index

Average room rates calculated for "midscale" to "upper upscale" hotels for calendar year (US dollars) | October 2017–October 2018 average or most recent

This index measures the average price, in US dollars, of midscale to upper upscale hotel accommodation in each country. The index is calculated by using the average room rate achieved by midscale to upper upscale hotels in each country over a 12-month period from October 2017 through October 2018 to mitigate the impact of any seasonality fluctuations. Data may refer to earlier period where the 2018 update is not available.

Source: STR Global.

8.03 Purchasing power parity

Ratio of purchasing power parity (PPP) conversion factor to official exchange rate | 2017 or most recent

The World Bank defines the purchasing power parity (PPP) conversion factor as the number of units of a country's currency required to buy the same amount of goods and services in the domestic market as a US dollar would buy in the United States. Official exchange rate refers to the exchange rate determined by national authorities or to the rate determined in the legally sanctioned exchange market. It is calculated as an annual average based on monthly averages (local currency units relative to the US dollar). The variable shown is the PPP conversion factor to market exchange rate ratio as reported by the World Bank's *World Development Indicators* database.

Source: The World Bank, *World Development Indicators* database (retrieved May 2019).

8.04 Fuel price levels

Retail diesel fuel prices expressed as US cents per litre | 2016 or most recent

This indicator refers to the pump prices of the most widely sold grade diesel fuel.

Source: The World Bank, *World Development Indicators* database (retrieved May 2019).

PILLAR 9: ENVIRONMENTAL SUSTAINABILITY

9.01 Stringency of environmental regulations

Response to the survey question "How do you assess the stringency of your country's environmental regulations?" [1 = very lax – among the worst in the world; 7 = among the world's most stringent] | 2017–2018 weighted average

Source: World Economic Forum, Executive Opinion Survey.

9.02 Enforcement of environmental regulations

Response to the survey question "In your country, how do you assess the enforcement of environmental regulations?" [1 = very lax – among the worst in the world; 7 = among the world's most rigorous] | 2017–2018 weighted average

Source: World Economic Forum, Executive Opinion Survey.

9.03 Sustainability of travel and tourism industry development

Response to the survey question "In your country, to what extent is the travel and tourism sector developed in an environmentally sustainable way?" [1 = not at all, 7 = to a great extent] | 2017–2018 weighted average

Source: World Economic Forum, Executive Opinion Survey.

9.04 Particulate matter (2.5) concentration

Population-weighted exposure to PM2.5 (micro-grams per cubic meter) | 2015

PM2.5, also known as fine particulate matter, refers to particles or droplets in the air that are 2.5 micrometres or less in width. Although invisible to the naked human eye as individual particles, PM2.5 can reduce visibility and cause the air to appear hazy when its levels are elevated. PDS (Gridded Population of the World) was resampled at the same 10 x 10 km spatial resolution as the PMC (Annual global surface PM2.5 concentrations), and the fraction of country population in each grid cell was calculated. The fraction of country population is multiplied times the PM2.5 concentrations in each grid cell, and the result is summed over the entire country to create a population-weighted ambient concentration of PM2.5. For more details, refer to: https://epi.envirocenter.yale.edu/downloads/epi2018technicalappendixv05.pdf.

Source: Wendling, Z.A., J.W. Emerson, D.C. Esty, M.A. Levy, A. de Sherbinin, et al., *2018 Environmental Performance Index.* New Haven, CT: Yale Center for Environmental Law & Policy, 2018, https://epi.yale.edu/.

9.05 Number of environmental treaty ratifications

Total number of ratified environmental treaties (0–29 scale, where 29 is best) | 2019

This indicator measures the total number of international treaties from a set of 29 for which a state is a participant. A state is acknowledged as a participant whenever is status for each treaty appears as Ratified, Accession, or In Force. The treaties included are: the International Convention for the Regulation of Whaling,; the Convention on Wetlands of International Importance especially as Waterfowl Habitat, 1971 Ramsar; the Convention Concerning the Protection of the World Cultural and Natural Heritage, 1972 Paris; the Convention on the Prevention of Marine Pollution by Dumping of Wastes and Other Matter, 1972 London, Mexico City, Moscow, Washington; the Convention on International Trade in Endangered Species of Wild Fauna and Flora, 1973 Washington; the International Convention for the Prevention of Pollution from Ships (MARPOL) as modified by the Protocol of 1978, London; the Convention on the Conservation of Migratory Species of Wild Animals, 1979 Bonn; the United Nations Convention on the Law of the Sea, 1982 Montego Bay; the Convention on the Protection of the Ozone Layer, 1985 Vienna; the Protocol on Substances that Deplete the Ozone Layer, 1987 Montreal; the Convention on the Control of Transboundary Movements of Hazardous Wastes and their Disposal, 1989 Basel; the International Convention on Oil Pollution Preparedness, Response and Co-operation, 1990 London; the United Nations Framework Convention on Climate Change, 1992 New York; the Convention on Biological Diversity, 1992 Rio de Janeiro; the International Convention to Combat Desertification in Those countries Experiencing Serious Drought and/or Desertification, particularly Africa, 1994 Paris; the Agreement relating to the Implementation of Part XI of the United Nations Convention on the Law of the Sea of 10 December 1982, 1994 New York; the Agreement relating to the Provisions of the United Nations Convention on the Law of the Sea relating to the Conservation and Management of Straddling Fish Stocks and Highly Migratory Fish Stocks, 1995 New York; the Kyoto Protocol to the United Nations Framework Convention on the Climate Change, Kyoto 1997; the Convention on the Law of the Non-navigational Uses of International Watercourses, 1997; the Rotterdam Convention on the Prior Informed Consent Procedure for Certain Hazardous Chemicals and Pesticides in International Trade, 1998 Rotterdam; the Cartagena Protocol of Biosafety to the Convention on Biological Diversity, 2000 Montreal; the Protocol on Preparedness, Response and co-operation to Pollution Incidents by Hazardous and Noxious Substances, 2000 London; the Stockholm Convention on Persistent Organic Pollutants, 2001 Stockholm; the International Treaty on Plant Genetic Resources for Food and Agriculture, 2001 Rome; the International Tropical Timber Agreement, 2006 Geneva; the Supplementary Protocol on Liability and Redress to the Cartagena Protocol on Biosafety, 2010 Nagoya – Kuala Lumpur; the Protocol on Access to Genetic Resources and their Fair and Equitable Sharing of Benefits Arising from their Utilization to the Convention on Biological Diversity, Nagoya 2010; the Convention on Mercury, Minamata, 2013; and the Paris Agreement 2015.

Source: The International Union for Conservation of Nature (IUCN), Environmental Law Centre, *ELIS Treaty* database.

9.06 Baseline water stress

Normalized (0–5) projected water stress | 2014

Based on annual water withdrawal data, this indicator estimates projected future country-level water stress for 2020 under a business-as-usual (BAU) scenario. For more details, see Luck, M., M. Landis, and F. Gassert, *Aqueduct Water Stress Projections: Decadal Projections of Water Supply and Demand Using CMIP5 GCMs*, Technical note (Washington, DC: World Resources Institute, April 2015), http://www.wri.org/publication/aqueduct-water-stress-projections.

Source: World Resources Institute, *Aqueduct*.

9.07 Threatened species

Threatened species as a percentage of total species (mammals, birds and amphibians) | 2018

This indicator measures the total number of Critically Endangered, Endangered and Vulnerable species as a percentage of total known species for mammals, birds and amphibians

Source: The International Union for Conservation of Nature (IUCN), *Red List of Threatened Species 2018.*

9.08 Forest cover change

Forest loss in > 30% tree cover since 2000 | 2016

This indicator measures the loss in the sum of annual tree cover between 2000 and 2016 in areas with greater than 30% tree cover, divided by 2000 forest extent. Thirty-meter resolution satellite images are used to quantify the area of forest loss. Trees are defined as all vegetation taller than 5m in height. Forest loss is defined as a standard-replacement disturbance or the complete removal of tree cover canopy at the Landsat pixel scale. Results are disaggregated by reference percent tree cover stratum (e.g. >30% crown cover to ~0% crown cover) and by year. No value is calculated for countries with less than 200 sq. km. (according to FAO FRA 2010) of >30% tree cover in 2000 or less than 3% of land area covered by >30% tree cover. For more information refer to: https://epi.envirocenter.yale.edu/downloads/epi2018technicalappendixv05.pdf.

Source: World Economic Forum's calculations based on 2018 Environmental Performance Index: https://epi.yale.edu/.

9.09 Wastewater treatment

Percentage of wastewater that receives treatment weighted by connection to wastewater treatment rate | 2016

This indicator measures the percentage of wastewater that is treated before it is released back into ecosystems. Wastewater treatment performance is measured by volume of wastewater that is treated over time. Performance metrics are established by public or privately-owned operated utilities for a municipal area. A number of datasets were collated to compute this indicator: A source-type hierarchy was used to find a value for each data point: 1) country-level statistical data and reports; 2) OECD and EuroStat values were then used ("population connected to a wastewater treatment plant") and; 3) United Nations Statistics Division's "Population connected to wastewater treatment" variable; 4) percentage of wastewater treated to secondary and tertiary treatment levels from the Global Water Intelligence and the Pinsent-Masons Water Yearbook; 5) FAO-AQUASTAT values ("Total volume of wastewater treated" / "Total volume of wastewater collected"*100) for a given year, country. For more information refer to: https://epi.envirocenter.yale.edu/downloads/epi2018technicalappendixv05.pdf.

Source: Wendling, Z.A., J.W. Emerson, D.C. Esty, M.A. Levy, A. de Sherbinin, et al., *2018 Environmental Performance Index.* New Haven, CT: Yale Center for Environmental Law & Policy, 2018, https://epi.yale.edu/.

9.10 Fish stock status

Overexploited or collapsed fish stock caught in an exclusive economic zone (EEZ) (% of total catch) | 2014

This indicator is based on an assessment of the percentage of fish stocks caught within a country's Exclusive Economic Zone (EEZ) that are overexploited or collapsed. For more information refer to: https://epi.envirocenter.yale.edu/downloads/epi2018technicalappendixv05.pdf.

Source: Source: Wendling, Z.A., J.W. Emerson, D.C. Esty, M.A. Levy, A. de Sherbinin, et al., *2018 Environmental Performance Index.* New Haven, CT: Yale Center for Environmental Law & Policy, 2018, https://epi.yale.edu/.

PILLAR 10: AIR TRANSPORT INFRASTRUCTURE

10.01 Quality of air transport infrastructure

Response to the survey question "In your country, how is the quality (extensiveness and condition) of transport infrastructure for the following: Air transport?" [1 = extremely underdeveloped – among the worst in the world; 7 = extensive and efficient – among the best in the world] | 2017–2018 weighted average

Source: World Economic Forum, Executive Opinion Survey.

10.02 Available seat kilometres, domestic

Scheduled available domestic seat kilometres originating in country per week (year average) | 2018

This indicator measures an airline's passenger-carrying capacity. It is composed of the number of seats available on each domestic flight multiplied by the flight distance in kilometres. The final value represents the weekly average for the year (Jan–Dec), taking into account flights scheduled beforehand by airline companies.

Source: International Air Transport Association, *SRS Analyser.*

10.03 Available seat kilometres, international

Scheduled available international seat kilometres originating in country per week (year average) | 2018

This indicator measures an airline's passenger-carrying capacity. It is composed of the number of seats available on each international flight multiplied by the flight distance in kilometres. The final value represents the weekly average for the year (Jan–Dec), taking into account flights scheduled beforehand by airline companies.

Source: International Air Transport Association, *SRS Analyser.*

10.04 Aircraft departures

Number of aircraft departures per 1,000 population | 2017 or most recent

Aircraft departures are the number of domestic and international take-offs of air carriers registered in the country.

Source: The World Bank, *World Development Indicators* database (accessed May 2019).

10.05 Airport density

Number of airports with at least one scheduled flight per million of urban population | 2018

Urban population refers to people living in urban areas as defined by national statistical offices.

Source: World Economic Forum's calculation based on International Air Transport Association, *SRS Analyser*, and United Nations, *World Urbanization Prospects: The 2018 Revision, Online Edition.*

10.06 Number of operating airlines

Number of airlines with scheduled flights originating in country | 2018

Source: International Air Transport Association, *SRS Analyser.*

PILLAR 11: GROUND AND PORT INFRASTRUCTURE

11.01   Quality of roads

Response to the survey question "In your country, how is the quality (extensiveness and condition) of transport infrastructure for the following: a. Roads?" [1 = extremely underdeveloped – among the worst in the world; 7 = extensive and efficient – among the best in the world] | 2017–2018 weighted average

Source: World Economic Forum, Executive Opinion Survey.

11.02   Road density

Kilometres of road per 100 square kilometres of land | 2016 or most recent

Road density is the ratio of the length of the country's total road network to the country's land area. The road network includes all roads in the country: motorways, highways, main or national roads, secondary or regional roads and other urban and rural roads.

Source: International Road Federation, *IRF World Road Statistics 2018* and *The World Factbook 2019*, Central Intelligence Agency, 2019.

11.03   Paved road density

Kilometres of paved road per square kilometre of land | 2016 or most recent

Road density is the ratio of the length of the country's total paved road network to the country's land area. Paved roads are those surfaced with crushed stone (macadam) and hydrocarbon binder or bituminized agents, with concrete, or with cobblestones, as a percentage of all the country's roads, measured in length.

Source: International Road Federation, *IRF World Road Statistics 2018* and *The World Factbook 2019,* Central Intelligence Agency, 2019.

11.04   Quality of railroad infrastructure

Response to the survey question "In your country, how is the quality (extensiveness and condition) of transport infrastructure for the following: b. Railroads?" [1 = extremely underdeveloped – among the worst in the world; 7 = extensive and efficient – among the best in the world] | 2017–2018 weighted average

Source: World Economic Forum, Executive Opinion Survey.

11.05   Railroad density

Kilometres of railroad per 100 square kilometres of land | 2017 or most recent available

Railroad density is the ratio of the length of the country's total railroad network to the country's land area. Rail lines are the length of railway routes available for train service, irrespective of the number of parallel tracks.

Sources: The World Bank, *World Development Indicators* database (retrieved on May 2019) and *The World Factbook 2019*, Central Intelligence Agency, 2019.

11.06   Quality of port infrastructure

Response to the survey question "In your country, how is the quality (extensiveness and condition) of transport infrastructure for the following: d. Seaports (for landlocked countries – please assess access to seaports)"? [1 = extremely underdeveloped – among the worst in the world; 7 = extensive and efficient – among the best in the world] | 2017–2018 weighted average

Source: World Economic Forum, Executive Opinion Survey.

11.07   Ground transport efficiency

Average score across the two components of the following Executive Opinion Survey questions: "In your country, how efficient (i.e. frequency, punctuality, speed, price) are the following transport services? a. Ground transportation (buses, subways, taxis)?" [1 = extremely inefficient – among the worst in the world; 7 = extremely efficient – among the best in the world] and "In your country, how efficient (i.e. frequency, punctuality, speed, price) are the following transport services? b. Train services"? [1 = extremely inefficient – among the worst in the world; 7 = extremely efficient – among the best in the world] | 2017–2018 weighted average

Source: World Economic Forum, Executive Opinion Survey.

PILLAR 12: TOURIST SERVICE INFRASTRUCTURE

12.01   Hotel rooms

Number of hotel rooms per 100 population | 2017 or most recent

Source: World Tourism Organization, UNWTO Database, latest available data, UNWTO.

12.02   Quality of tourism infrastructure

Response to the question "In your country, how do you assess the quality of tourism infrastructure (e.g. hotels, resorts, entertainment facilities)?" [1 = very poor – among the worst in the world; 7 = excellent – among the best in the world]) | 2017–2018 weighted average

Source: World Economic Forum, Executive Opinion Survey.

12.03   Presence of major car rental companies

Presence of major car rental companies (0 = no company is present, 7 = all seven considered companies are present) | 2018 or most recent

This indicator measures the presence of seven major car rental companies: Avis, Budget, Europcar, Hertz, National Car Rental, Sixt and Thrifty. For each country we calculate how many of these companies operate via online research.

Source: World Economic Forum's calculations based on the individual rental car websites.

12.04   Automated teller machines per adult population

Number of automated teller machines (ATMs) per 100,000 adult population | 2017

Source: The World Bank, *World Development Indicators* database (retrieved on May 2019).

PILLAR 13: NATURAL RESOURCES

13.01   Number of World Heritage natural sites

Number of World Heritage natural sites in the country | 2018 or most recent

World Heritage natural sites are those properties that the World Heritage Committee considers as having outstanding universal value.

Source: UNESCO World Heritage List (accessed January 2019), available at http://whc.unesco.org/en/syndication.

13.02   Total known species

Total known species of mammals, birds and amphibians in the country | 2018

This indicator measures the total known species of mammals, birds and amphibians.

Source: The International Union for Conservation of Nature (IUCN), Red List Threatened Species.

13.03   Total protected areas

Total square kilometres of terrestrial and marine areas under protection as a share of country's total territorial area | 2017

Terrestrial protected areas are totally or partially protected areas of at least 1,000 hectares that are designated by national authorities as scientific reserves with limited public access, national parks, natural monuments, nature reserves or wildlife sanctuaries, protected landscapes, and areas managed mainly for sustainable use. Marine protected areas are areas of intertidal or subtidal terrain—and overlying water and associated flora and fauna and historical and cultural features—that have been reserved by law or other effective means to protect part or all of the enclosed environment. Sites protected under local or provincial law are excluded.

Source: *World Database on Protected Areas (WDPA),* via The World Bank, *World Development Indicators* database (retrieved on February 2019).

13.04   Natural tourism digital demand

Number of online searches index (0–100 scale, where 100 is best) | 2016, 2017, 2018 moving average

This indicator measures the total online search volume related to the following nature-related brandtags: Beaches, Adventure and Extreme, Diving, Fishing, Hiking, Surfing, Water Sports, Winter Sports, Animal Watching, Protected Areas and Sustainable and Rural Tourism. The calculation is based on the proprietary D2 tool which assesses the attractiveness of each country by analyzing online tourism-related search data across the relevant brandtags, each comprising destination-specific keywords correlated to tourist activities and attractions. A total of 3,818,000 keywords were analysed across nine languages: English, Spanish, French, Italian, German, Portuguese, Russian, Japanese and Chinese.

Source: Bloom Consulting based on *Country Brand Ranking, Tourism Edition.* Available at https://www.bloom-consulting.com/en/country-brand-ranking.

13.05   Attractiveness of natural assets

Response to the question "To what extent do international tourists visit your country mainly for its natural assets (i.e. parks, beaches, mountains, wildlife, etc.)?" [1 = not at all, 7 = to a great extent] | 2017–2018 weighted average

Source: World Economic Forum, Executive Opinion Survey.

PILLAR 14: CULTURAL RESOURCES AND BUSINESS TRAVEL

14.01   Number of World Heritage cultural sites

Number of World Heritage cultural sites in the country | 2018 or most recent

World Heritage cultural sites are those properties that the World Heritage Committee considers as having outstanding universal value.

Source: UNESCO World Heritage List (accessed January 2019), available at http://whc.unesco.org/en/syndication.

14.02   Oral and intangible cultural heritage expressions

Number of oral and intangible heritage practices and expressions | 2018 or most recent

Intangible cultural heritage practices are those practices, representations, expressions, knowledge, skills—as well as the instruments, objects, artifacts and cultural spaces associated therewith—that communities, groups and, in some cases, individuals recognize as part of their cultural heritage. This intangible cultural heritage, transmitted from generation to generation, is constantly recreated by communities and groups in response to their environment and their interaction with nature and their history, and provides them with a sense of identity and continuity, thus promoting respect for cultural diversity and human creativity. The Intergovernmental Committee for the Safeguarding of the Intangible Cultural Heritage evaluates annually nominations proposed by States Parties to the Convention for the Safeguarding of the Intangible Cultural Heritage and decides whether or not to inscribe those cultural practices and expressions of intangible heritage on the Convention's Lists. For more details about the criteria for inscription, please visit http://www.unesco.org/culture/ich/en/lists.

Source: UNESCO World Heritage List (accessed January 2019), available at http://www.unesco.org/culture/ich/en/lists.

14.03   Number of large sports stadiums

Total number of sports stadiums with a capacity larger than 20,000 seats | 2018 or most recent

The count of stadiums with a capacity greater than 20,000 is a proxy for the ability of the country to host significant sports or entertainment events (i.e. concerts, shows).

Source: World Economic Forum's calculations based on Worldstadiums.com.

14.04   Number of international association meetings

Number of international association meeting held in the country annually | 2015–2017 or most recent

This indicator measures the average number of international associations meetings held annually in each country between 2015 and 2017. These figures are based on the ICCA Association database, which includes meetings organized by international associations, matching the following criteria: a) take place on a regular basis, b) rotate between a minimum of three countries and, c) have at least 50 participants. Note: For El Salvador, Kazakhstan, Lao PDR, Namibia and Zambia, value includes an author's estimate for 2016 figure based on the country share of 2013–2015 mean multiplied by total 2016 meetings.

Source: The International Congress and Convention Association (ICCA).

14.05   Cultural and entertainment tourism digital demand

Number of online searches index (0–100 scale, where 100 is best) | 2016, 2017, 2018 moving average

This indicator measures the total online search volume related to the following cultural brandtags: Historical Sites, Local People, Local Traditions, Museums, Performing Arts, UNESCO, City Tourism, Religious Tourism, Local Gastronomy, Entertainment Parks, Leisure Activities, Nightlife and Special Events. The calculation is based on the proprietary D2 tool which assesses the attractiveness of each country by analysing online tourism-related search data across the relevant brandtags, each comprising destination-specific keywords correlated to tourist activities and attractions. A total of 3,818,000 keywords were analysed across nine languages: English, Spanish, French, Italian, German, Portuguese, Russian, Japanese and Chinese.

Source: Bloom Consulting based on *Country Brand Ranking, Tourism Edition.* Available at https://www.bloom-consulting.com/en/country-brand-ranking.

Appendix D
Income Group and Regional Classifications

Table D1: Income group classifications, 2019

The following income group classifications were used for creating the performance tables and figures in Part 1 and Part 2.

Low income (US$995 or less)	Lower-middle income (US$996-3,895)	Upper-middle income (US$3,896-12,055)	High income (US$12,055 or more)	
Benin	Angola	Albania	Argentina	Poland
Burkina Faso	Bangladesh	Algeria	Australia	Portugal
Burundi	Bolivia	Armenia	Austria	Qatar
Chad	Cambodia	Azerbaijan	Bahrain	Saudi Arabia
Congo, Dem. Rep.	Cameroon	Bosnia and Herzegovina	Belgium	Seychelles
Ethiopia	Cape Verde	Botswana	Brunei Darussalam	Singapore
Gambia, The	Côte d'Ivoire	Brazil	Canada	Slovak Republic
Guinea	Egypt	Bulgaria	Chile	Slovenia
Haiti	El Salvador	China	Croatia	Spain
Liberia	Eswatini	Colombia	Cyprus	Sweden
Malawi	Georgia	Costa Rica	Czech Republic	Switzerland
Mali	Ghana	Dominican Republic	Denmark	Taiwan, China
Mozambique	Honduras	Ecuador	Estonia	Trinidad and Tobago
Nepal	India	Guatemala	Finland	United Arab
Rwanda	Indonesia	Iran, Islamic Rep.	France	Emirates
Senegal	Kenya	Jamaica	Germany	United Kingdom
Sierra Leone	Kyrgyz Republic	Jordan	Greece	United States
Tajikistan	Lao PDR	Kazakhstan	Hong Kong SAR	Uruguay
Tanzania	Lesotho	Lebanon	Hungary	
Uganda	Mauritania	Malaysia	Iceland	
Yemen	Moldova	Mauritius	Ireland	
Zimbabwe	Mongolia	Mexico	Israel	
	Morocco	Montenegro	Italy	
	Nicaragua	Namibia	Japan	
	Nigeria	North Macedonia	Korea, Rep.	
	Pakistan	Paraguay	Kuwait	
	Philippines	Peru	Latvia	
	Sri Lanka	Romania	Lithuania	
	Tunisia	Russian Federation	Luxembourg	
	Ukraine	Serbia	Malta	
	Viet Nam	South Africa	Netherlands	
	Zambia	Thailand	New Zealand	
		Turkey	Norway	
		Venezuela	Oman	
			Panama	

Note: Classification corresponds to the World Bank's income classification based on gross national income per capita, for fiscal year 2019.

Table D2: Regional classifications, 2019

The following regional classifications were used for creating the performance tables and figures in Part 1 and Part 2.

The Americas	Asia-Pacific	Europe and Eurasia	Middle East and North Africa (MENA)	Sub-Saharan Africa
North and Central America	**Eastern Asia-Pacific**	**Balkans and Eastern Europe**	**Middle East**	**Eastern Africa**
Canada	Australia	Albania	Bahrain	Burundi
Costa Rica	China	Bosnia and Herzegovina	Iran, Islamic Rep.	Congo, Democratic Rep.
Dominican Republic	Hong Kong SAR	Bulgaria	Israel	Ethiopia
El Salvador	Japan	Hungary	Jordan	Kenya
Guatemala	Korea, Rep.	Moldova	Kuwait	Malawi
Haiti	Mongolia	Montenegro	Lebanon	Mauritius
Honduras	New Zealand	North Macedonia	Oman	Mozambique
Jamaica	Taiwan, China	Poland	Qatar	Rwanda
Mexico		Romania	Saudi Arabia	Seychelles
Nicaragua	**South Asia**	Serbia	United Arab Emirates	Tanzania
Panama	Bangladesh	Slovak Republic	Yemen	Uganda
Trinidad and Tobago	India	Slovenia		
United States	Nepal		**North Africa**	**Southern Africa**
	Pakistan	**Eurasia**	Algeria	Angola
South America	Sri Lanka	Armenia	Egypt	Botswana
Argentina		Azerbaijan	Morocco	Eswatini
Bolivia	**South-East Asia**	Georgia	Tunisia	Lesotho
Brazil	Brunei Darussalam	Kazakhstan		Namibia
Chile	Cambodia	Kyrgyz Republic		South Africa
Colombia	Indonesia	Russian Federation		Zambia
Ecuador	Lao PDR	Tajikistan		Zimbabwe
Paraguay	Malaysia	Ukraine		
Peru	Philippines			**Western Africa**
Uruguay	Singapore	**Northern Europe**		Benin
Venezuela	Thailand	Denmark		Burkina Faso
	Viet Nam	Estonia		Cameroon
		Finland		Cape Verde
		Iceland		Chad
		Latvia		Côte d'Ivoire
		Lithuania		Gambia, The
		Norway		Ghana
		Sweden		Guinea
				Liberia
		Southern Europe		Mali
		Croatia		Mauritania
		Cyprus		Nigeria
		Greece		Senegal
		Italy		Sierra Leone
		Malta		
		Portugal		
		Spain		
		Turkey		
		Western Europe		
		Austria		
		Belgium		
		Czech Republic		
		France		
		Germany		
		Ireland		
		Luxembourg		
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Bloom Consulting is an international consulting firm that specializes in Nation Branding and Place Branding. Today, the firm's headquarters are based in Madrid, Spain. Since 2003, Bloom Consulting has been developing strategies for countries, regions and cities across the 5 continents. The company works with government leaders with a clear objective in mind: to manage their country's brand as a strategic asset from an economic and social point of view. Bloom Consulting annually publishes the Bloom Consulting Country Brand Ranking© for Trade and Tourism. The ranking analyzes the brand performance of 180 countries and territories worldwide.

Digital Demand

Digital Demand - D2© is an intelligence software that gathers and analyzes the total amount of "searches" performed by global citizens of any country, region or city, allowing them to measure their real interest, appeal and reputation across five dimensions: Export, Investment, Tourism, Talent or Prominence (Public Diplomacy). Every year, Digital Demand – D2© publishes the www.digitalcountryindex.com and the www.digitalcityindex.com to reveal which countries are most searched online for these dimensions.

IATA

The International Air Transport Association (IATA), founded in April 1945, is the trade association for the world's airlines, representing some 290 airlines or 82% of total air traffic. It works together with many partners to shape the future growth of a safe, secure and sustainable air transport industry that connects and enriches our world.

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IUCN is a membership Union uniquely composed of both government and civil society organisations. It provides public, private and non-governmental organisations with the knowledge and tools that enable human progress, economic development and nature conservation to take place together.

Created in 1948, IUCN is now the world's largest and most diverse environmental network, harnessing the knowledge, resources and reach of more than 1,300 Member organisations and some 15,000 experts. It is a leading provider of conservation data, assessments and analysis. Its broad membership enables IUCN to fill the role of incubator and trusted repository of best practices, tools and international standards.

IUCN provides a neutral space in which diverse stakeholders including governments, NGOs, scientists, businesses, local communities, indigenous peoples organisations and others can work together to forge and implement solutions to environmental challenges and achieve sustainable development.

Working with many partners and supporters, IUCN implements a large and diverse portfolio of conservation projects worldwide. Combining the latest science with the traditional knowledge of local communities, these projects work to reverse habitat loss, restore ecosystems and improve people's well-being.

STR provides premium data benchmarking, analytics and marketplace insights for global hospitality sectors. Founded in 1985, STR maintains a presence in 15 countries with a corporate North American headquarters in Hendersonville, Tennessee, an international headquarters in London, and an Asia Pacific headquarters in Singapore. For more information, please visit str.com.

The World Tourism Organization (UNWTO) is the United Nations agency responsible for the promotion of responsible, sustainable and universally accessible tourism. As the leading international organization in the field of tourism, UNWTO promotes tourism as a driver of economic growth, inclusive development and environmental sustainability and offers leadership and support to the sector in advancing knowledge and tourism policies worldwide.

UNWTO encourages the implementation of the Global Code of Ethics for Tourism, to maximize tourism's socio-economic contribution while minimizing its possible negative impacts, and is committed to promoting tourism as an instrument in achieving the Sustainable Development Goals (SDGs), geared towards reducing poverty and fostering sustainable development worldwide. UNWTO generates market knowledge, promotes competitive and sustainable tourism policies and instruments, fosters tourism education and training, and works to make tourism an effective tool for development through technical assistance projects in over 100 countries around the world. UNWTO's membership includes 158 countries, 6 Associate Members and over 500 Affiliate Members representing the private sector, educational institutions, tourism associations and local tourism authorities.

The World Travel & Tourism Council is the global authority on the economic and social contribution of Travel & Tourism. WTTC promotes sustainable growth for the Travel & Tourism sector, working with governments and international institutions to create jobs, to drive exports and to generate prosperity. Council Members are the Chairs, Presidents and Chief Executives of the world's leading private sector Travel & Tourism businesses.

WTTC produces annual research that shows Travel & Tourism to be one of the world's largest sectors, supporting over 319 million jobs and generating 10.4% of global GDP in 2018. Comprehensive reports quantify, compare and forecast the economic impact of Travel & Tourism on 185 economies around the world. In addition to individual country fact sheets, and fuller country reports, WTTC produces a world report highlighting global trends and 25 further reports that focus on regions, sub-regions and economic and geographic groups.

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